

AgLearn
Administrator Toolkit

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The Administration Environment

The Administration environment of AgLearn provides administrators with the ability to track the range of information needed to manage USDA learning programs effectively. This section provides an overview of the Administration environment, examples of common screen types, and job aids for referencing menu options and universal controls (i.e., common buttons, links, and icons) descriptions.

Go to http://www.aglearn.usda.gov and follow these steps to login as an Administrator to AgLearn:

- On the Learner Welcome page, click **Administrator Login** to reach the Administrator Welcome Page.
- On the Administrator Welcome Page, click **Administrator Login**.
- Click **Continue** to accept the security admonition.
- Enter your e-Authentication credentials.





Welcome to AgLearn!

Help your career and increase your knowledge with new and exciting courses built for you.

Learning Resources

New Courses - Just Released!

Learn what's new and different!

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AqLearn Supervisor Online Interactive Course Many improvements for supervisors, including an "at a glance" dashboard of "My Employees!

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 International Information Systems Security
- Certification Consortium
- Human Resource Certification Institute



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Administrators, Welcome to AgLearn!

AgLearn Administrators, welcome to a new area dedicated to your needs. Take a look around and let us know what you think.

Role-Based Online Training

AgLearn Basic Master Reporter

SF-182 Courses and Job Aid

Available SF-182 Courses

- How to Support SF-182s in AgLearn
- How to Complete and Submit an SF-182 How to Approve a Submitted SF-182 How to Verify Completed SF-182 Training



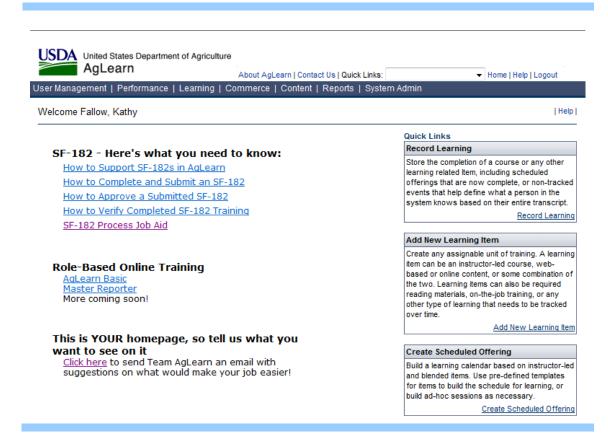
Note: Your view of the Administrator Home Page will depend on the specific role you've been assigned.

Administrator's Home Page

The **Administrator's Home Page** is the first screen that displays after logging in to the Administration environment of AgLearn. There are seven different views in the Administration environment:

- User Management
- Performance
- Learning
- Commerce
- Content
- Reports
- System Admin

The menu displays and options are restricted according to the permissions directly associated with AgLearn administration role of the person logged in. Areas in which an administrator does not have permission to work will not display.



Administration Environment Interface

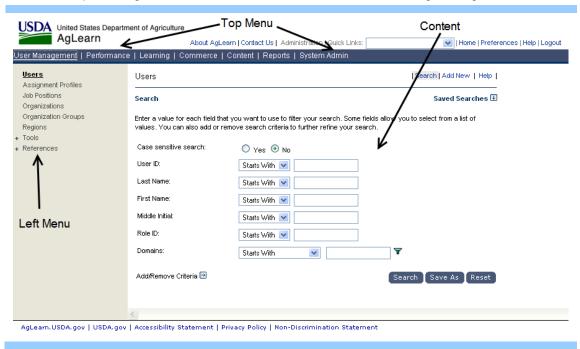
The interface for the Administration environment of AgLearn is comprised of three frames:

- Top Menu
- Left Menu
- Content

The **Top Menu** frame contains three buttons (universal controls) in the upper right corner and nine menu options spanning across the frame. Privileges assigned to each role determine which menu options are visible and accessible to the person logged in to AgLearn.

As **Top Menu** frame options are selected, corresponding sub-menu options are displayed in the **Left Menu** frame.

Note: See the **Menu Options** and **Menu Descriptions** tables for detailed information pertaining to the **Top Menu** frame. Also see the **Universal Controls** table for detailed information pertaining to buttons, fields, links, and tabs available throughout AgLearn.

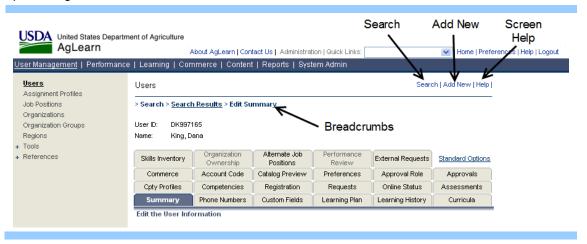


Administration Environment Interface, continued

The **Content** frame is the "working area," where searches are conducted and data/information is edited and viewed. There are several features which appear on the majority of screens in the **Content** frame:

- A "breadcrumb," or path, appears in the upper left corner of each **Content** frame and identifies a person's current location within AgLearn. (In this example, the "breadcrumb" indicates the person is at the **> Search** screen.)
- The context-sensitive **Help** link is located in the upper right corner of the **Content** frame and provides access to context-sensitive help.
- Simple and Advanced Search links are located in the upper right corner of the Content frame and provide the ability to conduct simple and advanced context-sensitive searches.
- Universal controls appear throughout AgLearn and provide the functionality for managing information.

Note: See the **Universal Controls** table at the end of this section for detailed information pertaining to them.



Screen Types

There are several types of screens comprising the **Content** frame. Below is a partial list of common screens types appearing throughout AgLearn:

- Search
- Results Tab
- Screens with Tabs
- Screens with Sections
- Reports
- Assistants

Notes:

Screen Types/Search

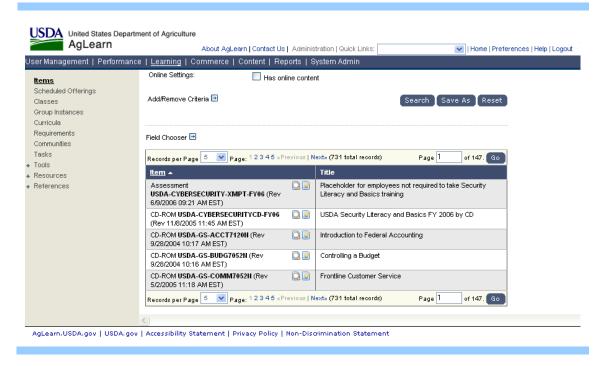
The **Search** screen is typically the default screen appearing when an option from the **Top Menu** frame is selected. This screen provides the ability to define criteria for narrowing a search. Depending upon the number of search criteria available, both **Simple** and **Advanced Search** options are available.

Note: See the **Universal Controls** table at the end of this section for detailed information pertaining to each control.



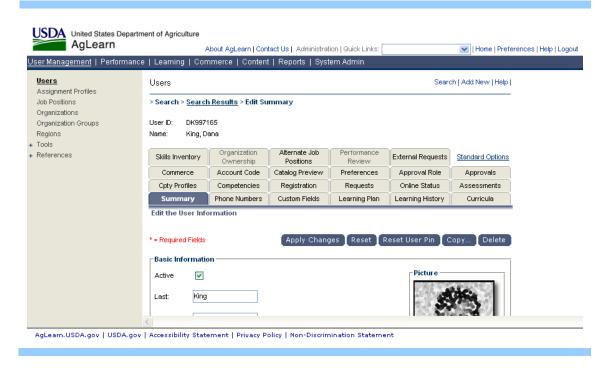
Screen Types/Results

When criteria are entered on a **Search** screen and the **Search** button is clicked, the **Results** display at the bottom of the **Search** screen. Clicking the appropriate icon next to a result allows the administrator to view or edit that result based upon the permissions/role of the person logged into AgLearn.



Screen Types/Tabs

Screens containing a great deal of data use tabs to present the information in a categorized fashion rather than displaying all of the information on one very long screen. The currently selected, or **active** tab, appears in dark blue. Clicking a tab provides the opportunity to view/edit the information on that tab. If edits are made to information on a tab, **Apply Changes** must be clicked prior to clicking a different tab (or information will be lost).



AgLearn uses the term Modules instead of Sections.

This screen illustrates two different sections – the Add this
Scheduled Offering to the Catalog section and the Update the Catalog Prices for the Scheduled Offering section.

Screen Types/Screens with Sections

Many screens are divided into different sections to group similar information or provide the ability to perform several tasks on one screen. Sections are separated from one another by section headers.

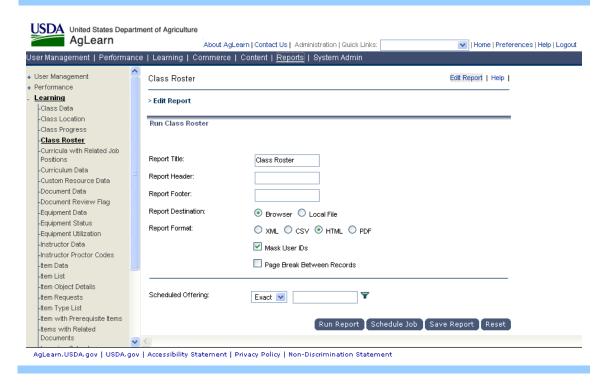
| | | | | | Standard Options |
|---------------------|----------------------|-------------------|-------------------|----------------|--------------------------|
| Notifications | Cost Calculation | Cost Summary | Pricing | Catalog | Chargeback |
| Summary | Segments | Registration | Contacts | Materials | Custom Fields |
| Edit the Schedu | led Offering | | | | |
| Add this Schedu | led Offering to the | Catalog | | | |
| Enter Catalog ID or | add one or more from | n list | | | |
| Catalog ID: | | | | | Add |
| Jpdate the Catal | og Prices for the S | cheduled Offering | 9 | | |
| | | | | <u>s</u> | elect All / Deselect All |
| Catalog ID | Catalog | Description | Price | e (\$) | Delete |
| PUBLIC | PUBLIC | | 0.00 | | |
| | | | | <u>s</u> | elect All / Deselect All |
| | | (C | hange Catalog Pri | ices X Apply (| Changes Reset |

Notes:

Screen Types/Reports

Reports are used to display and print AgLearn data. AgLearn report screens provide the ability to run a report immediately upon identifying the appropriate criteria, or to schedule the report to run at a later time.

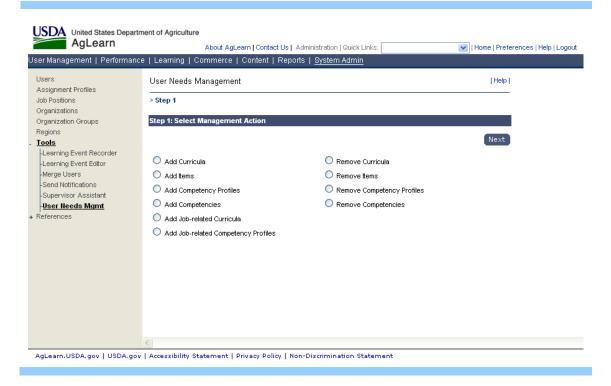
Note: See the Menu Options table to view a complete list of reports available in AgLearn.



Screen Types/Assistants

Assistants are time saving "wizards," used to perform certain tasks in a sequential, step-by-step, fashion. When working with an assistant, provide the information requested on a screen, then click **Next** to proceed to the following screen in the sequence (or the next step).

Note: See the Menu Options table to view a partial list of assistants available in AgLearn.



Menu Descriptions

The table below lists the seven menu options, with their corresponding descriptions, available to the AgLearn administrator.

| Menu Option | Example | Description |
|--------------------|-----------------|---|
| User Management | User Management | The User Management menu option provides access to those system functions used to manage general User information, User competency assessments, and User learning events. |
| Performance | Performance | The Performance menu option allows the administrator to manage competencies, performance evaluations, and succession planning. |
| Learning | Learning | The Learning menu option provides access to those system functions used to manage competencies, learning items (including online items), content objects, exam and survey objects, objectives, competency profiles, curricula, and questions. |
| Commerce | Commerce | The Commerce menu option provides access to those system functions used to track and update commercial transactions of Users and/or organizations defined in AgLearn. |
| Content | Content | The Content menu option provides access to those system functions used to manage online content, such as content objects (courseware), surveys, questions, and exam objects. |
| Reports | Reports | The Reports menu option provides access to those system functions used to generate any available AgLearn reports. |
| System Admin | System Admin | The System Admin menu option provides access to those system functions used to manage AgLearn application variables and settings, security and data domain privileges, custom columns, default notification messages, custom reports, and administrator information. |

Menu Options

The table below lists the seven menu options, with their corresponding sub-menu options, available to the AgLearn administrator.

| User Management | Performance | Learning | Commerce | Content | Reports | System Admin |
|---------------------|------------------------|------------------------|--------------------------------------|---------------------|--------------------|--------------------------|
| Users | Competencies | Items | Catalogs | Content Objects | User Management | + Application Admin |
| Assignment Profiles | Competency Profiles | Scheduled Offerings | Master Inventory | Content Packages | Performance | + Security |
| Job Positions | Succession Planning | Classes | Account codes | Questions | Learning | + Automatic Processes |
| Organizations | Skill Search | Group Instances | Order Management | Exam Objects | Content | + Configuration |
| Regions | + Tools | Curricula | Unused order Tickets | Objectives | System Admin | + Custom Columns |
| + Tools | + References | Requirement s | Financial Transaction Approval | Documents | | + Tools |
| + References | | Communities | + Tools | + Tools | | + References |
| | | Tasks | + References | | | |
| | | + Tools | | | | |
| | | + Resources | | | | |
| | | + References | | | | |

Universal Controls

The table below lists common examples of universal controls, with their corresponding descriptions, available throughout AgLearn.

| Menu Option | Example | Description | | | |
|---------------------------------|---|---|--|--|--|
| Tabs | Notifications Cost Calculation Summary Segments | Tabs contain information relevant to the selected record. Selecting a tab provides the opportunity to view and edit the information appearing on the tab. | | | |
| Apply Changes | Apply Changes | The Apply Changes button saves changes made to information appearing in the corresponding section of a screen. Important : Changes made to any record will not be saved unless the Apply Changes button is clicked before moving to another screen. | | | |
| Reset | Reset | The Reset button resets all fields on the corresponding screen to their original values. | | | |
| Add | Add | The Add button creates a new record corresponding to the selected submenu option (e.g., if Learning/Items is selected, clicking the Add button provides the opportunity to create a new Item record). | | | |
| View | Q | The View button appears on a Results screen and displays the corresponding record. | | | |
| Edit | ≧ | The Edit button appears on a Results screen and opens the corresponding record in Edit mode. | | | |
| Delete | Delete | The Delete button appears on a Summary tab and deletes the corresponding record. (You will be asked if you are sure before the record is deleted. There is no "Undo" key in AgLearn.) | | | |
| Records per Page | Records per Page 10 💌 | The Records per Page field indicates the number of records to be shown on each screen | | | |
| Search | Search | The Search button performs a search based on the criteria selected on the Search screen. | | | |
| Expand Tree | ± | The Expand Tree Icon indicates the data displayed is the parent of several other nested components. Click the icon to display the entire hierarchy. | | | |
| Collapse Tree | | The Collapse Tree Icon folds all child components under the parent. | | | |
| Filter | ₩ | The Filter icon opens a separate window to define search parameters. | | | |
| Expand | → | The Expand icon will open a pop-up window with additional options for the parameter with which it is associated. | | | |
| More Options | | The More Options icon will open a pop-up window with additional options for the parameter with which it is associated. | | | |
| Search | Q. | The Search icon performs a search based on the criteria selected on the Search screen. | | | |
| Add one or more from list | add one or more from list | The Add one or more from list link displays a search screen from which a search is conducted. | | | |
| Calendar | = | The Calendar icon opens a separate window to select and enter a date in its corresponding field. | | | |
| Next | Next | The Next button displays the next screen in a sequence when using one of the Assistants. | | | |
| Previous | Previous | The Previous button displays the previous screen in a sequence when using one of the Assistants. | | | |
| Submit | Submit | The Submit button submits the information entered on previous screens and completes the process when using an Assistant. | | | |

| Menu Option | Example | Description | | |
|-------------------------------|---------|---|--|--|
| Add New | Add New | The Add New link, located in the upper right corner of the Content frame, is available from the Search screen and provides the ability to add a new record (e.g., to add a new User, click Add New on the Users search screen). | | |
| Context- Sensitive Help | Help | Context-Sensitive Help , which is located in the upper right corner of the Content frame, displays in a new window the help screens relevant to the corresponding sub-menu option. | | |
| Help | Help | The Help button, which is located in the upper right corner of the Top Menu frame, opens the entire AgLearn Online Help System. | | |
| Home | Home | The Home button, which is located in the upper right corner of the Top Menu frame, displays the Administration Main Menu screen. | | |
| Logout | Logout | The Logout button, which is located in the upper right corner of the Top Menu frame, ends the current AgLearn session. | | |

Managing Data Entry and Searches

A number of search screens in AgLearn make it easy to find data by applying a search filter. Search filters can be created to suit any eventuality by adding or removing search criteria at will. Most administrators will find a regular set of search criteria that meets their most common needs, and will make only occasional changes for special circumstances.

Search-specific tasks include the following: Personalize a Search, Perform a Search, Personalize Search Results, Save a Search, Execute a Saved Search, Perform a Select or Add From List Search, Select and Enter a Date via the Calendar Icon and Perform a Selection via the Selection Icon.

A Day-in-the-Life Scenario

You need to be able to find all users whose last names begin with the letter "S." You also need to know how many users reside in a specific domain.

The search screen is available on many menus. The User Management menu is being used for illustration purposes.

| Adding/Removing Search Criteria | | | | | | |
|---------------------------------|---|---|--|--|--|--|
| Step | Activity | View | | | | |
| 1. | Select the User Management menu. | User Managem | ent | | | |
| 2. | Click the Expand icon next to Add/Remove Criteria | Add/Remove Crit | eria 🖟 | | | |
| 3. | Check (or uncheck) the boxes for the criteria you want to use. | ✓ Last Name ✓ First Name ✓ Middle Initial ✓ Role ID User Status ✓ Domains City State Country | Organizational Unit Account Code Ethics Filer Status Saved email for inactive Saved Supervisor ID for inactive Home Address Home City Home State | Close Entry On Service Entry On Management Promotion Date Job Series Job Title Occupational Category Pay Grade Pay Grade Step Pay Plan | | |
| 4. | Click Submit Query. | Submit Quer | у | | | |
| 5. | The options you selected will appear for subsequent searches. | Case sensitive search: User ID: Last Name: First Name: Middle Initial: Role ID: User Status: Domains: | Yes No Starts With Starts With Starts With Starts With Starts With Active Not Active Both Starts With | Ŧ | | |

The **Simple Search** screen opens when some left hand menu items are selected.

Performing a Search

Step Activity

1.

Select the **User Management** menu.

Note: The search screen is available on many menus. The User Management menu is being used for illustration purposes.

User Management

Search

View

2. Enter and/or select the basic search criteria as appropriate.

Note: The data fields may be left blank to select from an entire list.



3. Click Search.

4. Review search results.



To go to a specific page number, enter the desired number in the Page field and then click **Go**.

If necessary, select the Next Page link to go to the next page of results.



6. Select All from the Records per Page drop-down list to display every record in the results.



7. Select the View, or Edit, icon to perform the desired action.

| <u>User ID</u> ▲ | |
|------------------|-----|
| DK997165 | |
| DKZ37165 | Q 📝 |

Not all action icons associated with records in a search results screen may be displayed. The displayed actions are determined by the permissions given to the assigned role.

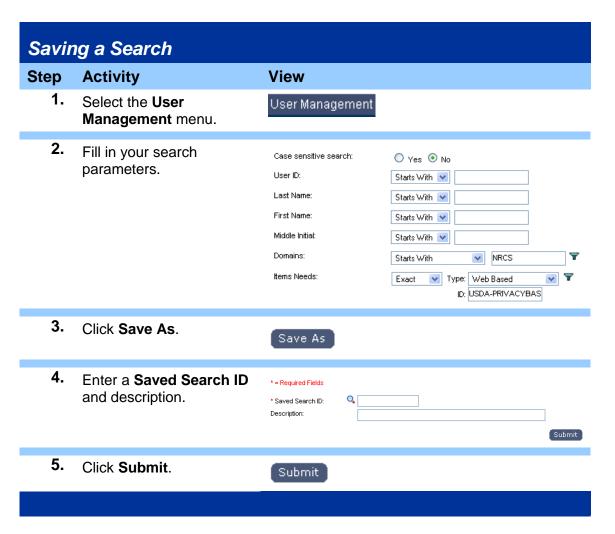
The search screen is available on many menus. The User Management menu is being used for illustration purposes.

Customizing Search Results

Once search results are displayed, you can add additional fields to be displayed on the search results screen.

| Step | Activity | View | |
|------|---|--|--|
| 1. | Select the User Management menu. | User Management | |
| 2. | Click the Expand icon next to Add/Remove Criteria . | Field Chooser | |
| 3. | Check (or uncheck) the criteria you would like to see displayed for your subsequent search results. | Field Chooser 1 User ID Organization ID Terminated 2 User Name Active Email Address 3 Domain ID Address Has Access 4 Supervisor City Locked Emp Status State / Province Region ID Emp Type Postal Code Role ID Job Location Country Job Position Hire Date | |
| 4. | Click Submit to see the search results with the additional fields. | (Submit) | |

The search screen is available on many menus. The User Management menu is being used for illustration purposes.



Executing a Saved Search Step **Activity** View 1. Select the User User Management The search screen is Management menu. available on many menus. The User 2. Management menu is Click the More Options Saved Searches 🖣 , being used for icon next to Saved illustration purposes. Searches. 3. Select the saved Search Saved Searches 🛂 you want to open. Close Name Remove NRCS DEMO PN JICY a a <u>Mandatory</u> a The **Search** form O Yes No Case sensitive search: appears, with the saved User ID: Starts With 💌 parameters already filled Last Name: Starts With 💌 in. Edit as needed. First Name: Starts With Middle Initial: Starts With Domains: NRCS Starts With Items Needs: Exact V Type: Web Based ID: USDA-PRIVACYBAS If you want to save any Search | Save | Save As | Reset edits for future searches, click Save, or click Save As to save them under a different name.

Search

6.

Click Search.

The Select from list search is available on other screens. The Items screen is being used for illustration purposes.

The **List** link enables you to add criteria to the search filter.

The select from list link allows the user to select more than one result. The selection icon presents a list from which only one result may be selected.

At this point you can remove filter records if you wish by selecting the **Remove** check box.

Performing a Select from List Search

Step Activity

View

1. Select the **Learning** menu.



2. Select Items.

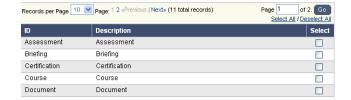


3. Select the Select from List icon, or search for the Item Type.



Starts With 💌

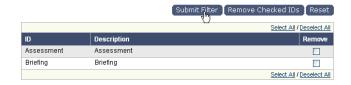
 Select the Select or Add check box next to the record(s) requested.



5. Click Submit Selection.

Submit Selection

6. Verify the selection and click **Submit Filter**.



The Calendar icon is available on many screens. The Scheduled Offerings screen is being used for illustration purposes.

Using the **Calendar** icon prevents date formatting errors.

You can also click on the > and >> symbols to change the month and year.

Selecting and Entering a Date via the Calendar Icon

Step Activity

View

Select the Learning menu.



2. Select Scheduled Offerings.



3. Click the Calendar icon next to the desired field.

Start Date After: (MM/DD/YYYY)



4. Select the month from the drop-down list.

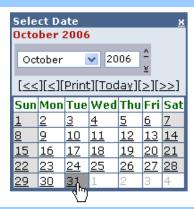


8. Click the increase or decrease buttons to change the year's display forward or backward.



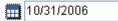
Select the desired date to enter the date and close the Select Date window.

Tip: Select the **Today** link to set the date to the current day.



Verify that the selected date appears in the **Date** field.

Start Date After: (MM/DD/YYYY)



The Selection icon is available on many screens. The Items screen is being used for illustration purposes.

Clicking the **Selection** icon will open a new Search window.

Leave any search fields blank to select from the entire list.

Click Next to move to additional pages of results or select All from the Results per Page drop down list to display all the results on the screen.

When the link is selected, the results window closes and the data is automatically entered into the field.

Performing a Selection When Only One Option May be Chosen

View

Activity Step

1. Select the Learning

Learning menu.

Select Items. 2.

<u>Items</u> S^m)eduled Offerings Classes

Select the Add New link. 3.

|Search | And New | Help |

Click the **Search** icon 4. next to the desired field to open a new Pick window.

* Domain ID:

5. Enter or select the search criteria as appropriate.

Case sensitive search: Domain ID:



Click Search. 6.

Search

Description:

7. Review search results.



Select the Select link of the record to be used for data entry.



Verify that the selected data has been placed in the field.

* Domain ID:



Managing Users

Most of the personal User data in AgLearn is automatically populated through regular data feeds (Domain, address, Job Position, Pay Grade, etc.) or is entered manually by the Users themselves (supervisor, e-mail address, phone numbers). There are some personnel-related functions that Users cannot take care of, as they are associated with multiple accounts, or are designed to provide information to, or take action on behalf of, the User.

The **Merge Users** functionality is useful when multiple accounts have been created for the same User. **Supervisor Assistant** allows the administrator to quickly update AgLearn when a supervisor change is made, instead of waiting for all of the affected Users to do it individually.

Administrators can add or remove training directly from the User's learning plans, as well as modify the 'Required By' dates for training that has already been assigned.

Ad Hoc Notifications allow the administrator to directly communicate via e-mail with a subset of Users that may be created just for that communication. (All those who have not completed a specific Item, for instance.) **Direct Linking** allows a User to go directly to a specified AgLearn page by clicking a URL embedded in an e-mail, possibly one generated by an ad hoc notification.

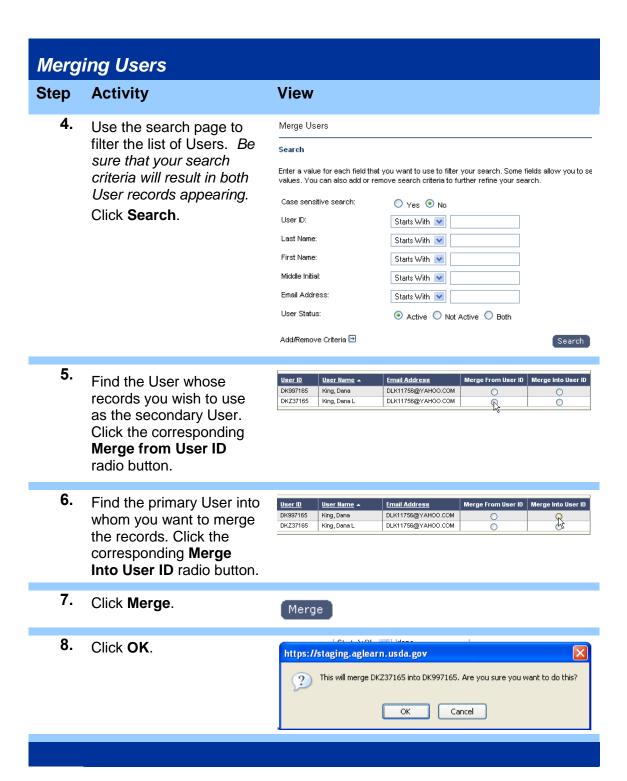
SF-182 forms used as requests for external training can be created, modified, approved, and verified by administrators with the necessary workflows.

Assignment Profiles are powerful compilations of attributes that may be used for catalog access, Item or curriculum assignment, or any function that involves potentially large numbers of Users with specific similarities.

A Day-in-the-Life Scenario

 Due to well-intentioned, yet misguided, efforts, a User has multiple accounts in AgLearn. Other Users have changed supervisors. These conditions must be corrected, and notifications should be sent informing the affected Users.

| Merging Users | | | |
|---------------|---|--|--|
| Step | Activity | View | |
| 1. | Select the User Management menu. | User Management | |
| 2. | Select Tools . | Regions + Tools + Refunces | |
| 3. | Select Merge Users . | Tools Learning Event Recorder Learning Event Editor Merge Users Sens Imptifications Supervisor Assistant User Needs Mgmt | |



| Supervisor Assistant | | | | |
|----------------------|--|---|--|--|
| Step | Activity | View | | |
| 1. | Select the User Management menu. | User Management | | |
| 2. | Select Tools . | Regions + Tools + Ref Inces | | |
| 3. | Select Supervisor Assistant. | Tools -Learning Event Recorder -Learning Event Editor -Merge Users -Send Notifications -Supervisor Assistant -User Needs Might | | |
| 4. | In the Supervisor ID text box, type the ID of the current supervisor, or click the Search icon to find and select one. | Step 1: Select Current Assigned Supervisor * = Required Fields * Supervisor ID: | | |
| 5. | Click Next. | Next | | |
| 6. | In the Supervisor ID text box, type the ID of the new supervisor, or click the Search icon to find and select one. | Step 2: Select New Assigned Supervisor * = Required Fields * Supervisor ID: Q | | |
| 7. | Click Next . | Next | | |

Supervisor Assistant

Step Activity

8. All Users under the Current Supervisor are displayed. To add a User to the list, type the User ID in the User ID text box, or click the Add one or more from list link to use a search page and select multiple Users.

You can also remove Users from the supervisor's list by clicking **Remove** on the appropriate line(s).





9. When you are satisfied the list is complete, click **Next**.

Next

10. Review the information. The User records displayed should reflect the new supervisor. If satisfied, click Finish. If not satisfied, click Previous to return to Step 8.

Finish

Assigning an Item to a User's Learning Plan can also be accomplished by using the User Needs Management Assistant. See Adding Items to User Record(s) with the UNM Assistant for detailed information.

If the Learner is in an incorrect domain, a person with the right permissions will need to move the corresponding record to the correct domain.

The tabs displayed after clicking edit depends on your assigned role.

Assign an Item to a Learning Plan Record

Step Activity

View

1. Select the User Management menu.



2. Select Users.



3. On the > Search screen, enter the appropriate search criteria.

Note: See Managing Data Entry and Searches for more detailed information on searching.



4. Click Search.



Locate the desired User record.

Tip: Use the **Ctrl+F** function to quickly find a User record on the screen.



6. Select the User's corresponding **Edit** link.



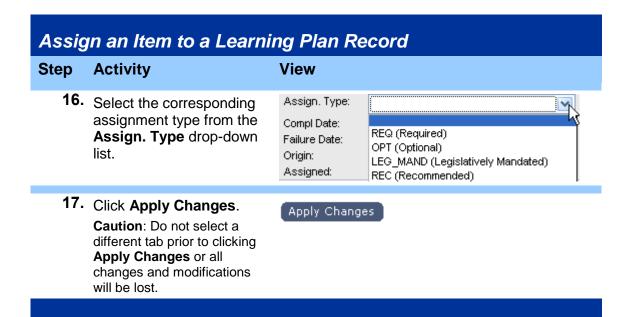
7. If it is not already displayed, select the **Learning Plan** tab.



8. In the Assign User
Needs section, select the
Add one or more from
list link.



Assign an Item to a Learning Plan Record Step **Activity** View On the > Search screen, Case sensitive search: O Yes No enter the appropriate Item Types: Starts With search criteria. ttem ID: Starts With Note: See Managing Data Revision Date: Entry and Searches for (MM/DD/YYYY) more detailed information on Revision Number: Starts With searching. ttem Title: Starts With Item Status: Item Classification: Starts With Online Settings: Has online content Domains: Starts With Subject Areas: Starts With 10. Click Search. Search 11. On the Results tab, Select All / Deselect All locate the Item to be Classroom USDA-AGLEARNADMIN-5.8NEW (Rev 9/19/2006 10:30 AM EST) AgLearn Training for New Administrators 11/20/2006 added to the Learning Classroom USDA-AGLEARNADMIN-5.8_DELTA (Rev 9/19/2006 10:36 AM EST) AgLearn Admin Training 5.8 Deltas ... Plan. 12. If the assign date is not Select All / Deselect All Title Add the current (default) date, AgLearn Training for Ne Administrators Classroom USDA-AGLEARNADMIN-5.8NEW (Rev 9/19/2006 10:30 AM EST) 鳳 11/20/2006 select the Assign Date calendar icon to select and enter the actual assign date. 13. Click Add to add the Item Add and return to the Learning Plan tab. 14. In the Update the Learning Plan for the View: OAll Needs ORequirements Show Duplicates: Yes User section, locate the Item recently added. Classroom USDA-AGLEARNADMIN-5.8NEW AgLearn Training for New Administrators Req. Date: 11/11/2006 DK997165a Days Rem: Curriculum ID: **15.** Select the corresponding Add Use Classroom USDA-AGLEARNADMIN-5.8NEW Req. Date: 11//11/2006 Days Rem: -9 Req. Date calendar icon to AgLearn DK997165a Training for Days Rem: enter the date by which the Curriculum ID: Administrators User must complete the Item.



Caution: Do not use the browser **Back** button when using AgLearn – use the menus, links and breadcrumbs in AgLearn to navigate.

Note: If an assigned Item has an associated prerequisite, it will not be automatically added to the Users' Learning Plans. Users will be presented with an opportunity to add the prerequisite to their plan when they try to access the assigned Item. **Tip**: If a User cannot be located, search for the User in other domains. During data entry, the User may have been mistakenly placed in an incorrect domain.

Removing an Item from a User's Learning Plan can also be accomplished by using the User Needs Management Assistant. See Removing Items from User Record(s) with the UNM Assistant for detailed information.

Use the Ctrl+F function to quickly find a User record on the screen.

Caution: Do not select a different tab prior to clicking Apply Changes or all changes and modifications will be lost.

Remove an Item from a Learning Plan Record

Step Activity

View

1. Select the User Management menu.

User Management

2. Select Users.



3. On the > Search screen, enter the appropriate search criteria.

Note: See Managing Data Entry and Searches for more detailed information on searching.



Records per Page 10 Page: 123 «Previous | Next» (30 total records)

Q V Learner, Alec

Q 📝

Update the Learning Plan for the User

View: O All O Needs O Requirements

Show Duplicates: Yes

User Name A

Learner, Bill

4. Click Search.



User ID

LEARNER05

On the Results tab, locate the desired User record.

6. Select the corresponding **Edit** icon.



FSA

TRAINING

of 3. Go

LEARNER05

LEARNER06

7. Select the Learning Plan tab.



8. In the Update the Learning Plan for the User section, locate the Item to be unassigned.

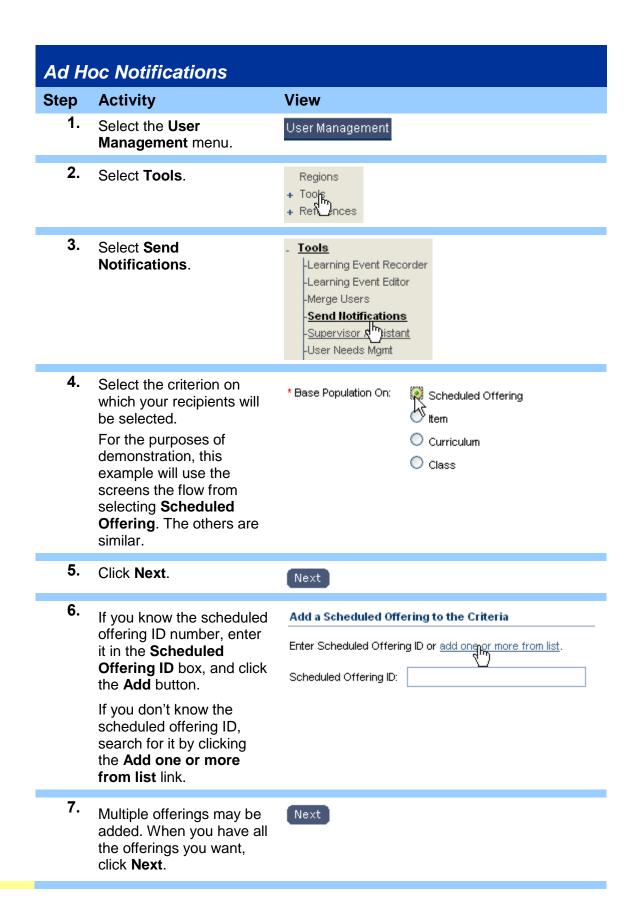


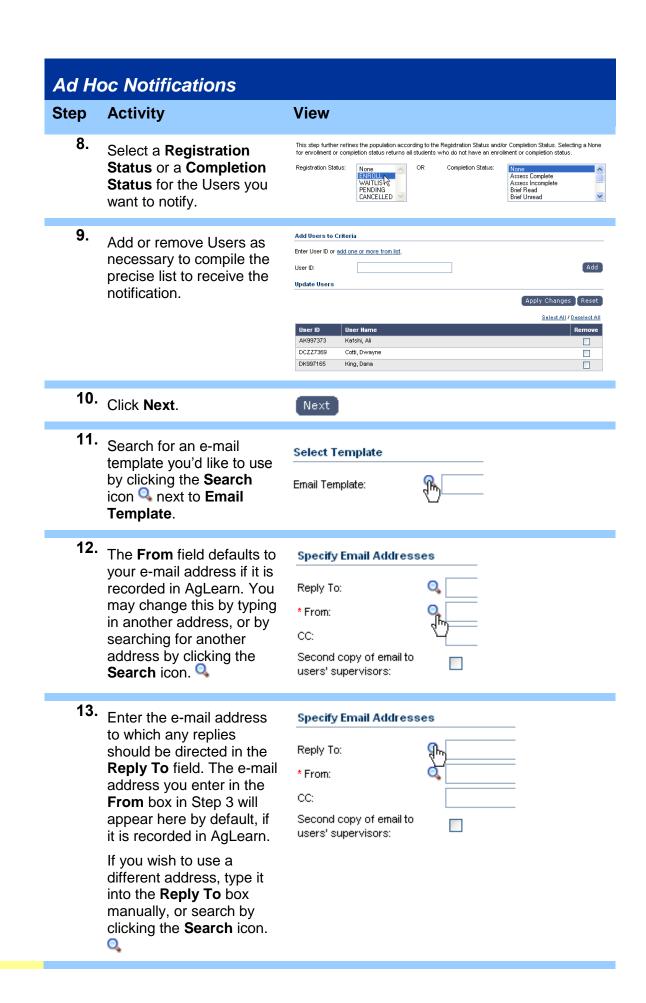
 Select the Remove check box to mark the Item for removal from the Learning Plan.



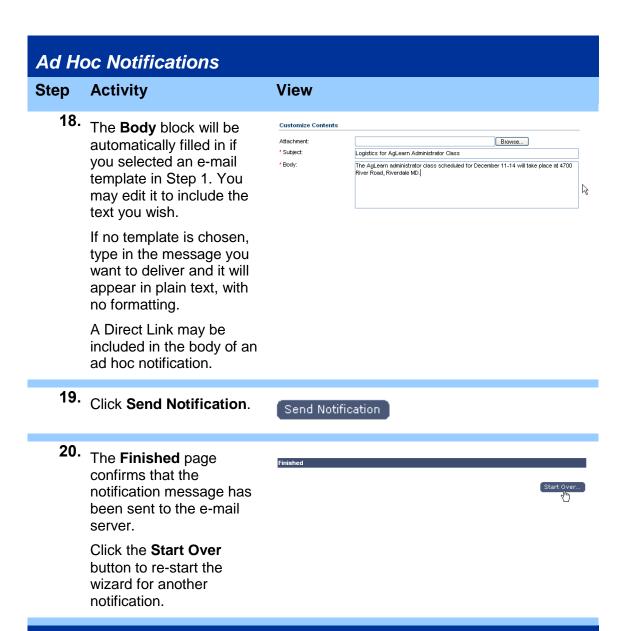
10. Click Apply Changes.

Apply Changes





Ad Hoc Notifications Step **Activity View** Type in the addresses of Specify Email Addresses any others who should receive this e-mail in the Q, Reply To: CC field. The addresses Q, * From: must be typed out in full and separated by teanaglearn@usda.gov CC: commas. Ŋ Second copy of email to users' supervisors: Check the **Second copy** Specify Email Addresses of email to users' supervisors box if you Reply To: would like the e-mail to Q, * From: also be sent to the supervisor of each User teanaglearn@usda.gov CC: listed. Second copy of email to users' supervisors: **16.** One file may be attached Customize Contents to the notification. Click Browse... * Subject: the Browse button to search for the file name and location. Type a subject or title for Customize Contents Browse... the notification in the Attachment * Subject: Logistics for AgLearn Administrator Class Subject box. * Body:



Direct Linking

AgLearn has the capability of providing HTML hyperlinks to specific pages in AgLearn so Users can directly access the pages. These links can be embedded in any environment that can accept HTML URLs, including e-mail notifications, Web pages, and documents. The User is taken directly to the appropriate page when the link is clicked, after providing login information if he or she is not already logged in.

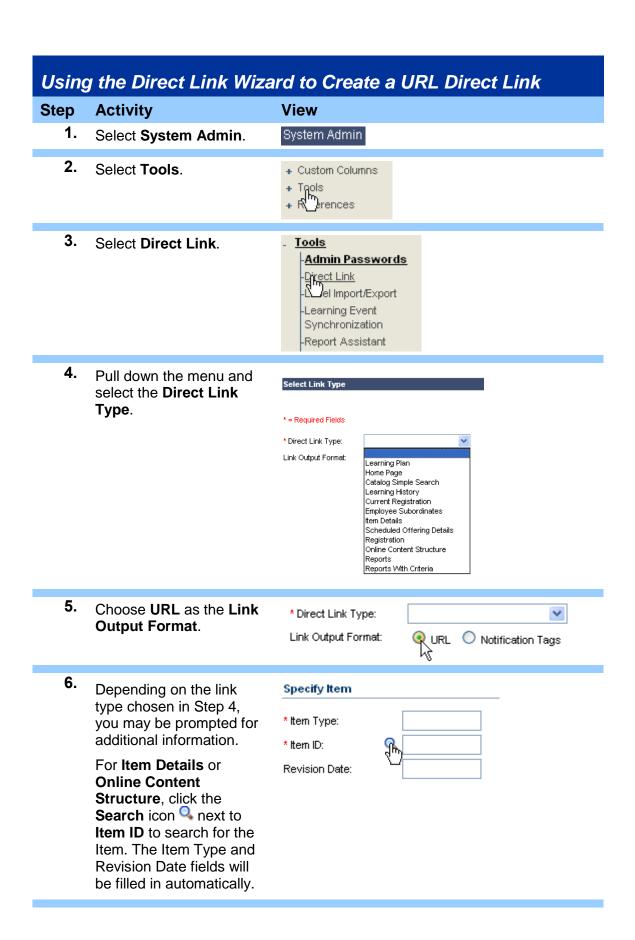
The use of direct links does not compromise security. Users will have access only to those sections of the application that their assigned workflow restrictions allow.

The Direct Linking Wizard is used to create the link after you have chosen the page. You can copy it into an e-mail or automatic notification so that the User can click the link or copy and paste it to reveal the exact page you want them to see.

Direct Links can be created to point Users to any of the following pages in AgLearn:

- All AgLearn learning pages Including Learning Plan, Home page, Catalog Simple Search page, Learning History page, Current Registration page, and the Employee Subordinates page. URL is the only output option available for these pages. You cannot choose to insert the link into notification tags.
- Item Details The User will be directed to the specified Item's Details page.
- Scheduled Offering Details The User will be directed to the specified scheduled offering's Details page.
- Registration Directs the User to the Registration page of the specified scheduled offering.
- Online Content Structure Directs the User to the Online Content Structure page for the Item specified.
- Report Creates a link to the specified User Report. (Note: Administrator reports are not available.)
- Reports with Criteria Creates a link to the specified User Report, and allows vou to specify the criteria for the report before creating the link.

Once the link has been created, it can be copied and pasted in an e-mail, document, or notification.



Using the Direct Link Wizard to Create a URL Direct Link Step **Activity** View 7. For Scheduled Offerings Specify Scheduled Offering or **Registrations**, click the **Search** icon 4 to * Scheduled Offering ID: 🦬ող search for the **Scheduled** Offering ID. You may also type it in directly, if you know it. 8. For Reports or Reports * = Required Fields with Criteria, enter the report you wish to have * Direct Link Type: Reports With Criteria run. Link Output Format: URL O Notification Tags If choosing Reports with Criteria, you will have a Select Report chance to specify the criteria after you have * User Report: ¥ chosen which report is to Curriculum Status be run. My Plan Item Requests Item Status item Status User Informatiงกิ Learning History 9. Click the **Display Link** Display Link button. 10. Copy the link. w is the direct link for the target you selected. This can be launched by Users directly 11. Customize Contents The link can now be Attachment: Browse... pasted directly into any e-* Subject: mail, including those sent * Borty: Paste Direct Link in body of email as needed. as an ad hoc notification.

External Training Requests

Administrators are now able to create SF-182 requests on behalf of employees, view and edit requests that are already in the pipeline, and make approvals as necessary. Requests can be submitted as pre-approved, and can be back-dated to accommodate training that has already taken place.

Creating an External Training Request on Form SF-182 **Activity** Step View 1. Select User User Management Management from the top menu. 2. Select **Users** from the left Users Æ gnment Profiles menu. Job Positions 3. Search for the User for USDA United States De AgLearn whom you wish to create the external request. **Note:** See Managing Data Entry and Searches for User ID: Starts With more detailed information on Last Name Starts With 💌 searching. First Name: Starts With 💌 Middle Initial Role ID: User Status Active Not Active Both Search Save As Reset Select the Edit icon for User ID User Name 4 the appropriate User. DK997165 Q King, Dana DKZ37165 King, Dana L 5. In the User's record, click Performance SF-182 Requests Standard Options Review the External Requests Preferences Approvals Approval Role

7766

7644

4246

4244

4243

4242

Test 20060703

Denied

Denied

Denied

Denied

Denied

None

None

None

None

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View Request

View Request

View Request

View Request

View Request

View Request

6.

button.

Click the New Request

Creating an External Training Request on Form SF-182

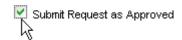
Step Activity

View

7. Part of the form will be automatically populated with data from the User's record. Complete as much of the form as necessary.

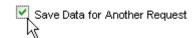


8. To submit the request as already approved and bypass the normal approval process, check Submit Request as Approved.



You must click **Submit** after checking this box for the request to be submitted for this User.

 To save the non-personal data so it can be used for another User, check Save Data for Another Request.



You must click **Submit** before **Select User** for the request to be submitted for the current User.

 To choose another User's record to apply the data saved in Step 7, click Select User.

Select User

11. To submit the completed form for approval, click **Submit**.

(Submit

12. To clear any changes made to the form, click **Reset**.

Reset

Editing an SF-182 Form

Step Activity

View

- Select User
 Management from the top menu.
- User Management
- 2. Select **Users** from the left menu.



3. Search for the User for whom you wish to create the external request.

Note: See Managing Data Entry and Searches for more detailed information on searching.



Select the Edit icon for the appropriate User.



5. In the User's record, click the External Requests tab.



6. Click the Edit Request link for the request to be edited.



7. The SF-182 pops up in a new window. Make the necessary changes.



8. Click **Apply Changes** to save the changes.

Apply Changes

9. When finished, click the Back to External Requests button.

Back to External Requests

Approving an SF-182 Form

Step Activity

View

- Select User
 Management from the top menu.
- User Management
- 2. Select **Users** from the left menu.



Search for the User for whom you wish to approve the external request.



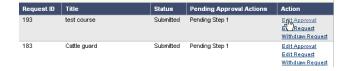
4. Select the **Edit** icon for the appropriate User.



5. In the User's record, click the External Requests tab.

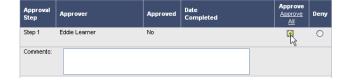


Click the Edit Approval link for the request to be edited.



You also have the option to click the **Approve All** link to complete the approval process with one action.

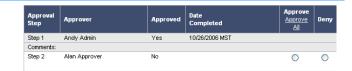
 Click the radio button under **Approve** or **Deny** for the next step in the process.



8. Click Apply Changes.



9. The screen will refresh, with the approval or denial noted.



Never use your browser's Back button to navigate in AgLearn. **10.** Click the **Back** button on the AgLearn screen.



Verifying External Training Requested via Form SF-182 **View** Step **Activity** 1. Select User User Management Management from the top menu. 2. Select Users from the left Users A^hgnment Profiles menu. Job Positions 3. Case sensitive search: Search for the User for O Yes No User ID: Starts With whom you wish to create Last Name: Starts With the external request. Starts With Middle Initial: Starts With Role ID: Starts With User Status: Active Not Active Both Select the Edit icon for <u>User ID</u> <u>User Name</u> the appropriate User. DK997165 Q 📝 King, Dana DKZ37165 King, Dana L In the User's record, click Performance SF-182 Requests Standard Options Review the SF-182 Requests Preferences Approval Role Approvals tab. 6. Click the **Verify** link for the request to be verified. Edit Approval Edit Request Withdraw Request Approved View Request Transfer Request Verify Neguest Transfer Request 107 Supervising in Iowa Approved None Verify Complete the form. 5/1/2008 V.6. All ses

See Managing Data

Entry and Searches

for more detailed

information on

searching.

Verifying External Training Requested via Form SF-182

View

Step Activity

and a second

8. Click **Submit** to send the form to the User's supervisor for approval. This allows the event to move into Learning History.

Note: If you are also approving the verification to move into Learning History, check the Submit Request as Approved box before clicking Submit.

9. If the verification was not submitted as "Approved," confirm the supervisor's name and click **Submit**.



Managing Items

An Item is a learning requirement that can be learning content, an exam, a survey, OJT, or an external certification. Items can also be developed for online usage.

A Day-in-the-Life Scenario

A new Web-based course must be added to AgLearn. The course will replace current department training on the prevention of sexual harassment. The following activities must be accomplished:

- The Item must be available to all employees in the Training domain.
- The Item must be made available online and should be marked Complete when all objects are complete.
- Learners can re-enter the course after completion for refresher training.

Viewing an Item Record Step **Activity** View 1. Select the **Learning** Learning menu. 2. Select Items. heduled Offerings 3. On the > Search screen, Item Types: Starts With 💌 enter the appropriate Starts With search criteria. Revision Date: (MM/DD/YYYY) Note: See Managing Data Revision Number: Starts With Entry and Searches for more detailed information on Item Title: Starts With searching. Item Status: Active ○ Not Active ○ Both Item Classification Starts With Online Settings: Has online content Domains: Starts With Subject Areas: Starts With Click Search. Search 5. On the **Results** display, locate the desired Item. Assessment USDA-CYBERSECURITY-XMPT-FY06 (Rev Placeholder for employees not required to take Security Literacy and Basics training 6/9/2006 09:21 AM EST) CD-ROM USDA-CYBERSECURITYCD-FY06 USDA Security Literacy and Basics FY 2006 by CD (Rev 11/8/2005 11:45 AM EST) Web Based USDA-CYBERSECURITY-FY06 (Rev 11/8/2005 11:42 AM EST) USDA Security Literacy and Basics FY 2006 Select the corresponding View icon to view the Item's Summary tab. 7. Click the Item's other data Pricina Chargeback Catalogs Subject Areas Standard Options Materials Online Settings Notifications Objectives Grading Options Cost Calculation tabs to view additional Custom Fields Requests information. Design Data Delivery Data Documents Tasks Prerequisites

Use Ctrl+F to quickly

If an Item can not be

located, search for the

Item in other domains.

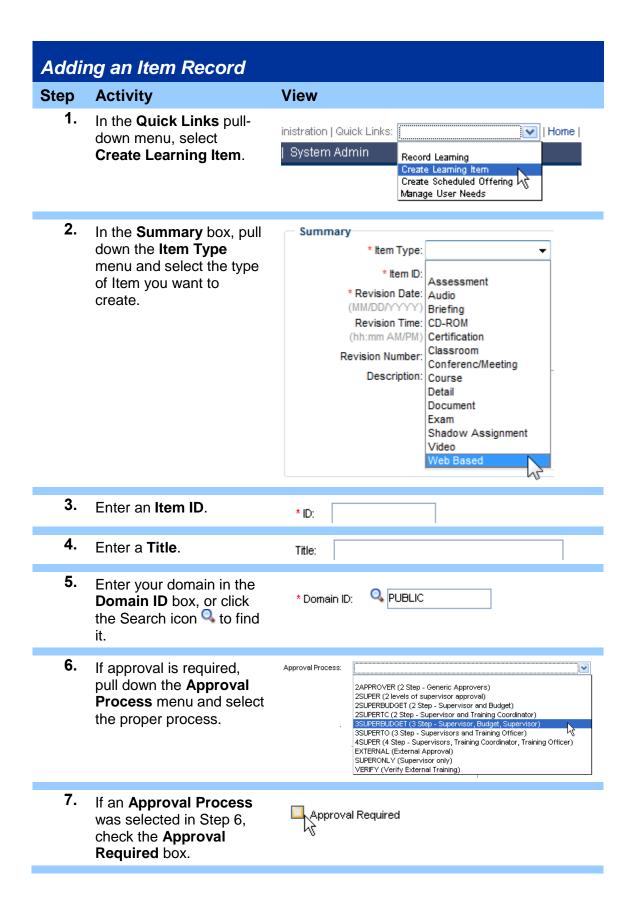
During data entry, the Item may have been

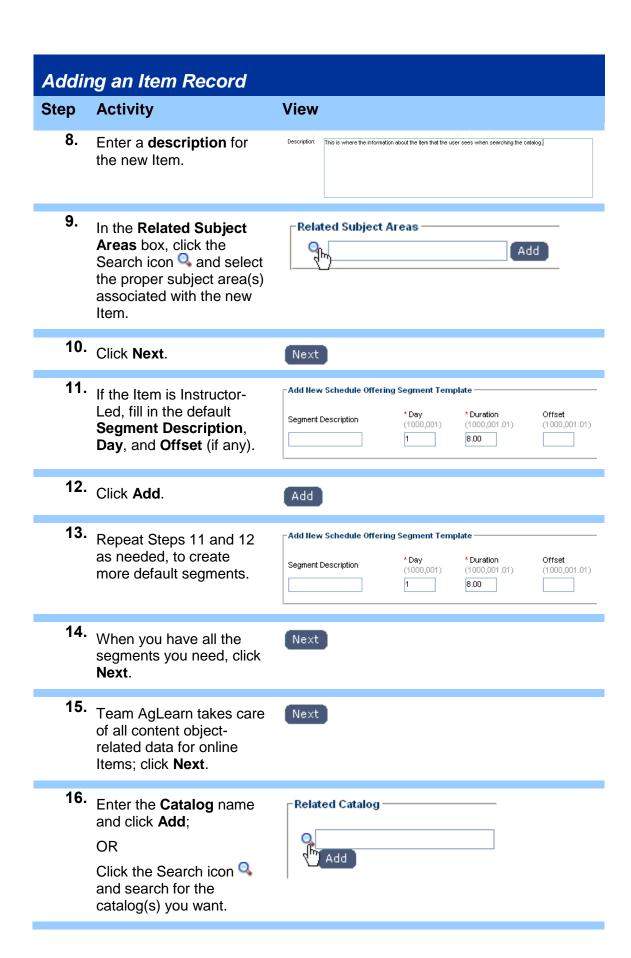
mistakenly placed in an

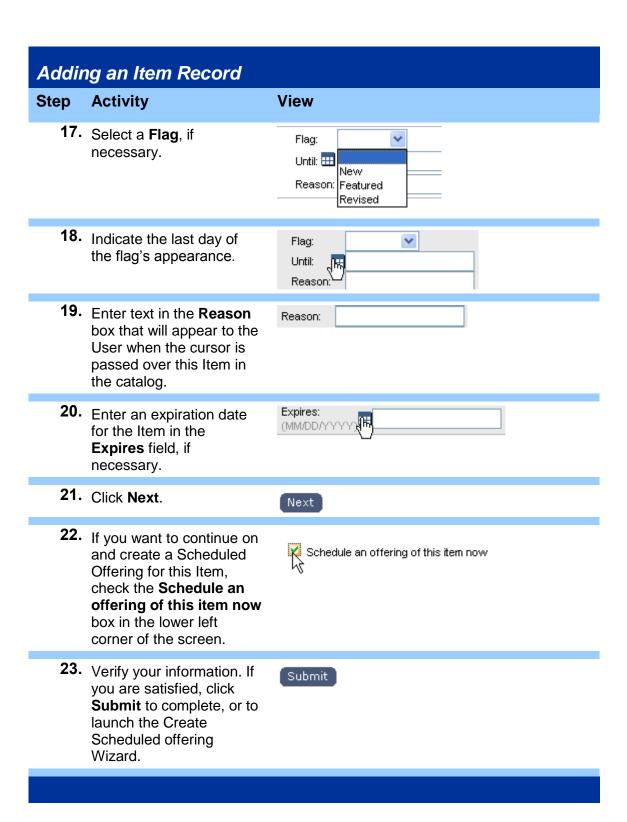
incorrect domain.

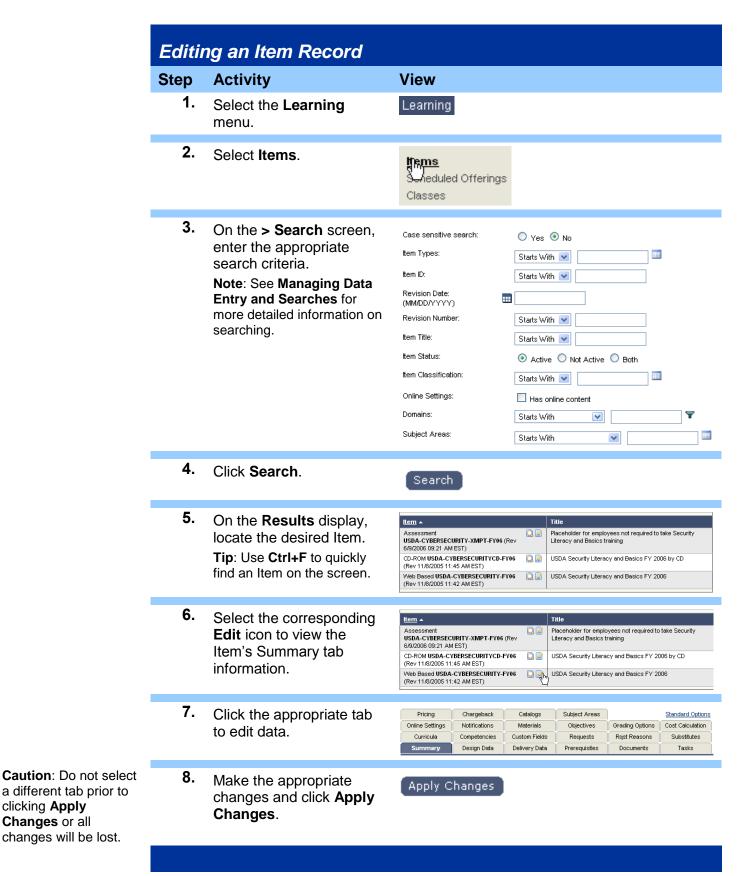
find an Item on the

screen.





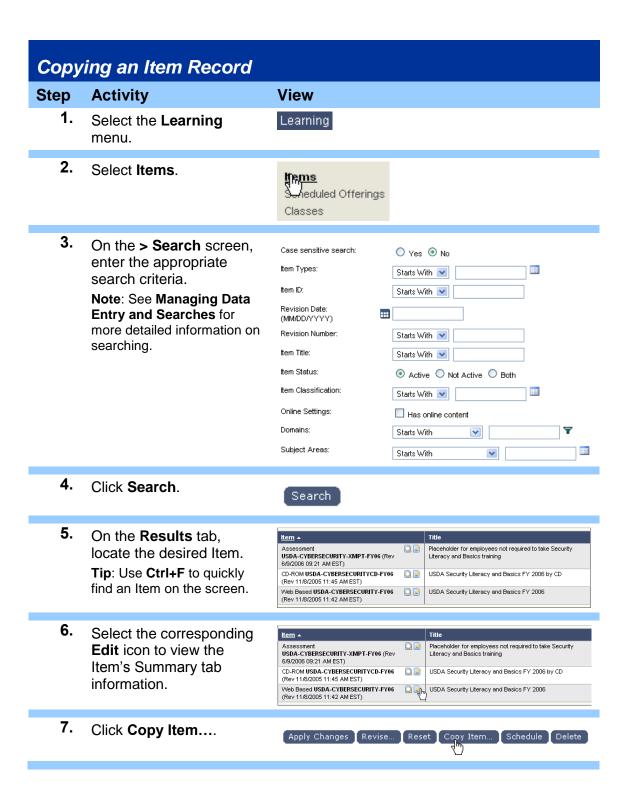




Tip: If an Item can not be located, search for the Item in other domains. During data entry, the Item may have been mistakenly placed in an incorrect domain.

clicking Apply

Changes or all



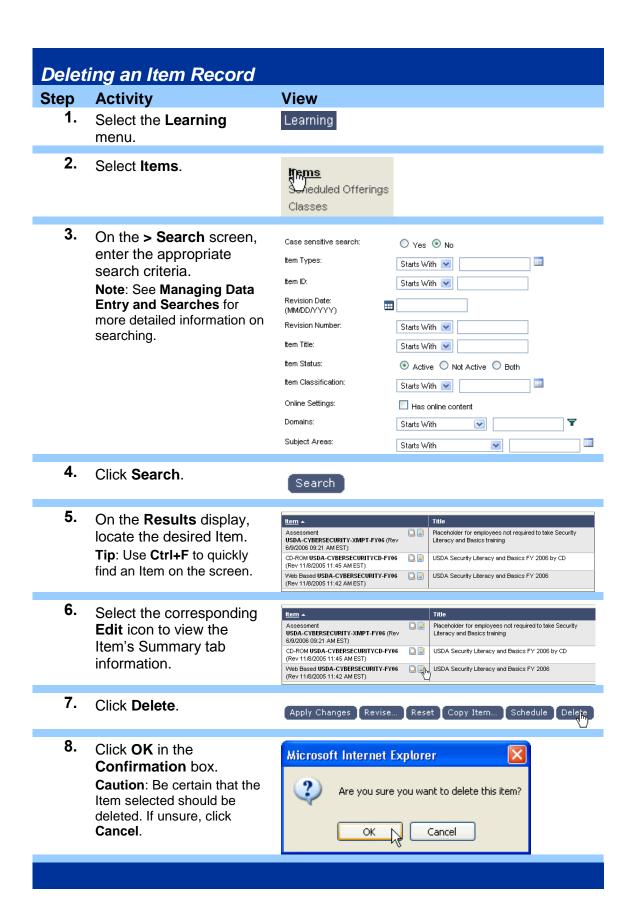
Copying an Item Record Step **Activity View** 8. Select the Item Type * Item Type: from the drop-down list. * Item ID: Assessment Audio Revision Date: Briefing (MM/DD/YYYY) CD-ROM Revision Time: Certification (hh:mm AM/PM) Classroom Time Zone: Conferenc/Meeting Course Revision Number: Detail Document Title: Exam Shadow Assignment Classification: Video Web Based Source ID: 9. Complete the New Item New Item ID: **ID** field. (Check current AgLearn naming standards.) 10. Click the New Revision New Revision Date: 11/20/2006 **Date** Calendar icon and (MM/DD/YYYY) select a new revision date for the Item. 11. Enter a Revision Time. Revision Time: (hh:mm AM/PM) 12. Select the correct Time EST (Eastern Standard Time) Zone from the Time Zone drop-down list.. 13. Select Copy Authorized ☑∑Copy Authorized to Instruct Data to Instruct Data to copy this data to the new Item. 14. Select Copy Substitutes Copy Substitutes Data Data to copy this data to the new Item. 15. Select Copy Related Copy Related Competency Data Competency Data to copy this data to the new Item. 16. Select Copy Related Copy Related Document Data **Document Data** to copy this data to the new Item.

| Copying an Item Record | | | | |
|------------------------|---|---------------------------------|--|--|
| Step | Activity | View | | |
| 17. | Select Copy Related Task Data to copy this data to the new Item. | Copy Related Task Data | | |
| 18. | Select Copy Prerequisite Data to copy this data to the new Item. | Copy Prerequisite Data | | |
| 19. | Select Copy Request Data to copy this data to the new Item. | ☑ Copy Request Data | | |
| 20. | Select Copy Online Settings to copy this data to the new Item. | ☑ Copy Online Settings | | |
| 21. | Select Copy Instructor Costs to copy this data to the new Item. | 🖳 ဥopy Instructor Costs | | |
| 22. | Select Add the new Item to the catalog to add the item to the catalog. | Add the new item to the catalog | | |
| 23. | Click Copy. Note: If the record is not associated with any other element in the application, there will be a Delete old record after copy check box. Select the checkbox to delete the old record after making a copy. | Сору | | |

Tip: If an Item cannot be located, search for the Item in other domains. During data entry, the Item may have been mistakenly placed in an incorrect domain.

Tip: To avoid data formatting errors when entering dates, use the Calendar Icon Assistant.

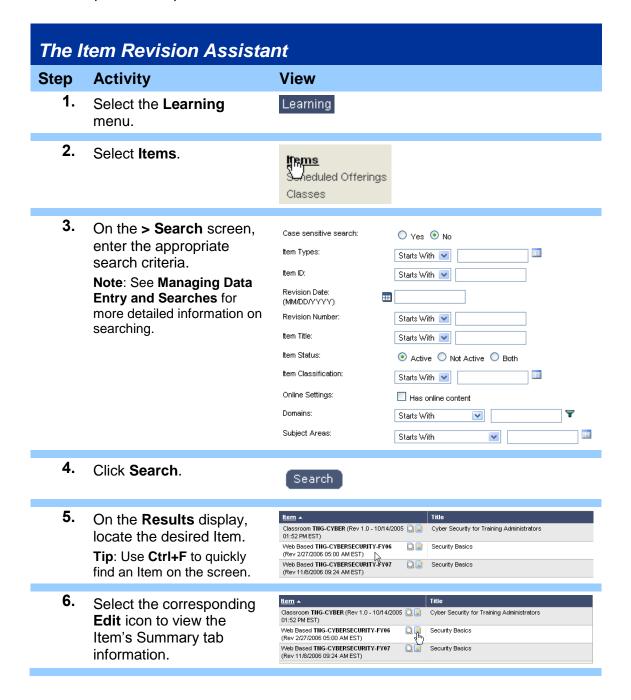
Note: See **Using the Selection Icon Assistant** for more detailed information pertaining to the Selection icon. See **Using the Calendar Icon Assistant** for more detailed information pertaining to the Calendar icon.

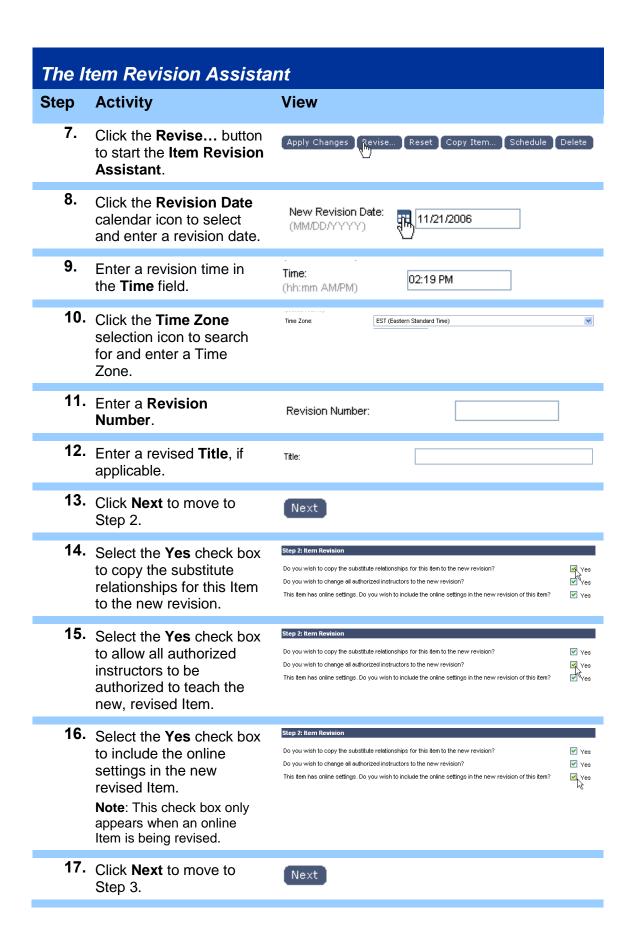


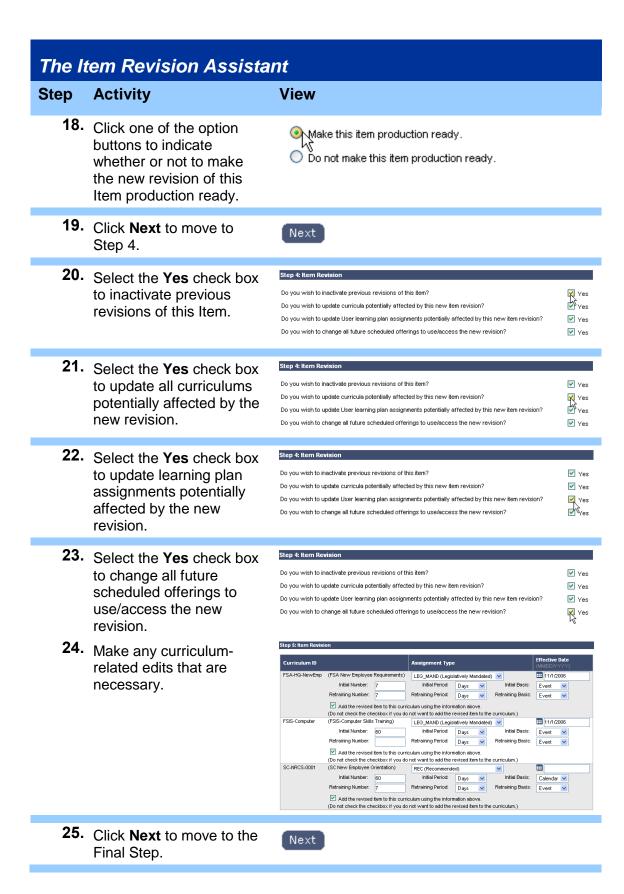
The Item Revision Assistant

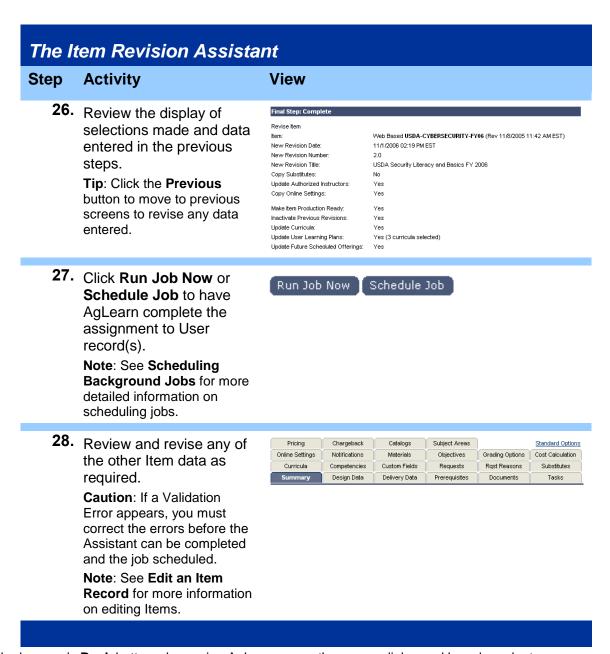
When editing an Item to create a new version (a revision) of that Item, the **Item Revision Assistant** provides on-screen instructions for each step of the revision process.

The Item Revision Assistant steps include: Step 1: Item Revision (Revision # and Date); Step 2: Item Revision (Relationships and Instructors); Step 3: Item Revision (Making Item Production Ready); Step 4: Item Revision (Update Curricula and Learning Plans); and the Final Step: Complete, which displays all of the choices made in previous steps.









Caution: Do not use the browser's **Back** button when using AgLearn – use the menus, links, and breadcrumbs to navigate.

Tip: To avoid data formatting errors when entering dates, use the Calendar Icon Assistant.

Managing Documents

A document is any media item (book, videotape, procedure, manual, audiotape, regulation, etc.) for which a record has been created, enabling it to be tracked. Documents are associated with Items, Curricula and/or Tasks.

Document management tasks are accessible from the References > Documents menu.

Managing Document subtasks include: View a Document Record, Add a Document Record, Edit a Document Record, and Delete a Document Record.

A Day-in-the-Life Scenario

The current version of the Intro to Microsoft Excel (TRN-DOCUMENT1) job aid must be verified. Find the document and verify that the current version has been reviewed for its applicability to the course material.

Notes

search.

appears.

Viewing a Document Record Step **Activity** View 1. Select the Content menu. Content Objectives 2. Select Documents. Documents + Tools You can perform either On the > Search screen, Case sensitive search: O Yes No a Simple or Advanced enter the appropriate Search depending Document ID: Starts With 💌 search criteria. upon the level of detail Note: See Managing Data Title: Starts With 💌 you need for your Entry and Searches for more detailed information on searching. 4. Click Search. Search If the document is in an 5. Locate the desired 12082004 incorrect domain, a SupervisorSafety document. 121 AgLearn Usage in the Field person with the right Q Supervisory Training Tip: Use Ctrl+F to quickly permissions will need find an Item on the screen. to move the record to the correct domain. After selecting the 6. Select the corresponding Object ID . View link, the > Search View icon to view more 12082004 > Search Results > information. View Summary screen 121 160

The purpose of creating a document record is to associate the document with an Item or Curricula. There is a **Document** tab in the Item and in the Curricula record that is used to create the association. See **Edit an Item** for additional information.

Once a Document record is in AgLearn, it is assigned to Items and Curricula through the Items and Curricula menus.

Type the electronic address of the document in the **Location** field to create the link from the Document in the Item with the actual Document.

Caution: A Validation Error field will appear if all required fields are not complete.

| Adding a Document Record | | | | | | |
|--------------------------|--|-------------------------------------|--|--|--|--|
| Step | Activity | View | | | | |
| 1. | Select the Content menu. | Content | | | | |
| 2. | Select Documents . | Objectives Documents + Tools | | | | |
| 3. | Select the Add New link. | Search Adri New | Help | | | |
| 4. | Enter a document ID in the Document ID field. | * Document ID: | | | | |
| 5. | Enter a document title in the Title field. | Title: | | | | |
| 6. | Select the Active check box if the document is active. | Active: | ✓ Active | | | |
| 7. | Click the Document Type search icon to search for and enter a document type. | Document Type: | , the second sec | | | |
| 8. | Click the Domain search icon and select the domain. | * Domain: | PUBLIC | | | |
| 9. | Enter the Source , Author , Location and Rev . No . (revision number) for the document. | Source: Author: Location: Rev. No.: | | | | |
| 10. | Click the Revision Date calendar icon to select and enter a revision date. | Rev. Date: (MM/DD/YYYY) | ™ | | | |
| 11. | Enter the Reviser , Approver , and Comments for the document in their respective fields. | Reviser: Approver: Comments: | | | | |
| 12. | Click Add . | Add | | | | |

If the document is in an

incorrect domain, a person with the right

to move the

screen.

permissions will need

corresponding record to the correct domain. Use Ctrl+F to quickly

find an Item on the

Required fields are

identified by a red

asterisk. Although

remaining fields are not

required, you should

complete as many as you feel necessary.

Editing a Document Record **Activity View** Step 1. Select the Content menu. Content 2. Objectives Select Documents. Documents Tools 3. On the > Search screen. Case sensitive search: O Yes No enter the appropriate Document ID: Starts With search criteria. **Note:** See Managing Data Title: Starts With 💌 Entry and Searches for more detailed information on searching. 4. Click Search. Search 5. Locate the desired FS-test SERO - SASP 01 document. 6. Select the corresponding Document ID . Edit icon to review the FS-test document information. SERO - SFSP 01 7. Select the **Active** check Active: Active box to indicate the document is active. Click the **Document Type** Document Type: search icon to select a document type. 9. Click the **Domain** search * Domain: PUBLIC icon and enter a different domain, if appropriate. Caution: Domain is a Required Field. **10.** Enter the **Source**, Source: Author. Location and Author: Revision Number for the Location: document in their respective fields if this Revision Number: information has changed.

Editing a Document Record Step **Activity** View 11. Click the Revision Date Revision Date: calendar icon to select (MM/DD/YYYY) and enter a revision date. 12. Enter the Reviser, Reviser: Approver, and Approver: Comments for the Comments: document in their respective fields if this information has changed. 13. Click on the Item tab to Summary Items Curricula review the Items to which the document is linked. 14. Select the Needs Review check box where Video ARS-FD-SHEM We All We all play a role (ARS SHEM Program) appropriate. Play a Role (Rev 7/20/2006 08:51 AM EST) Note: The Needs Review check box will be automatically checked when the revision numbers of the Document and/or Item are changed. 15. Click on the Curricula tab Curricula Items Tasks to review the Curricula to which the document is linked. 16. Select the Needs Review **Needs Review Curriculum ID** Title check box where TNG-Security 101 Basic Security appropriate. 17. Click on the Tasks tab to Curricula Tasks review the Tasks to which the document is linked. 18. Select the Needs Review Needs Review Task ID Description check box where TNG-SECURITY101 Basic Security 101 Introductory Task 4 appropriate. 19. Click Apply Changes. Apply Changes

The Needs Review

automatically checked

Curricula are changed.

check box will be

when the revision numbers of the

Documents and/or

If the document is in an

incorrect domain, a

to move the

person with the right

permissions will need

corresponding record to the correct domain.

Deleting a Document Record Step **Activity View** 1. Select the References Content menu. 2. Objectives Select Documents. Documents + Tools On the > Search screen, Case sensitive search: O Yes No enter the appropriate Document ID: Starts With 💌 search criteria. Note: See Managing Data Title: Starts With 💌 Entry and Searches for more detailed information on searching. 4. Click Search. Search 5. Locate the desired FS-test SERO - SASP 01 document. Summer Outreach Tip: Use Ctrl+F to quickly find a document on the screen. 6. Select the corresponding Document ID ▲ Edit icon to delete the FS-test document record. SERO - SFSP 01 7. Click Delete. Delete 8. Click **OK** in the Microsoft Internet Explorer Confirmation box. Are you sure you want to delete this document? Cancel

Managing Scheduled Offerings

View icon to view more

information.

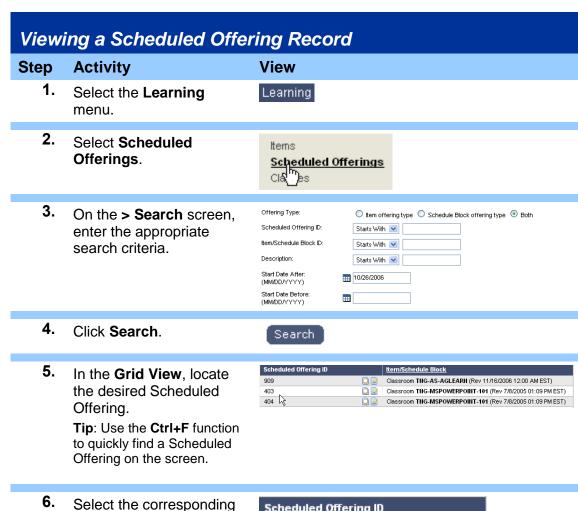
The Scheduled Offering Wizard is used to create a scheduled offering, assign it resources, and break it up into segments with the appropriate resources. You can enter the vital information and then edit it later on. You will assign an item, set up the segment, and select resources. The system will alert you to any scheduling conflicts right away so that you are aware of them and can make the necessary adjustments. The Calendar Preview gives you a graphic view of your new offering and the conflicts. Subtasks pertaining to Scheduled Offerings are accessible from the Scheduling menu. Scheduled Offering-specific subtasks include the following: View, Add, Edit, Copy, Cancel, Close, and Delete a Scheduled Offering Record, and **Use the Scheduled Offering Notification Assistant Tool.**

Notes

You can perform either a Simple or Advanced Search depending upon the level of detail needed.

If the Scheduled Offering is in an incorrect domain, a person with the right permissions will need to move the corresponding record to the correct domain.

Note: A Scheduled Offering is also viewable by clicking the Calendar View tab on the > Search screen and then the desired Offering ID link to open the corresponding record.



Scheduled Offering ID

909

403

404

Required fields are identified by a red asterisk. Although remaining fields are not required, you should complete as many as you feel are necessary.

If you create a Scheduled Offering for an online item, unregistered users will not be able to launch that item. Registered users will only be able to launch the item during the defined segment time periods.

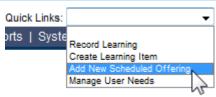
By using the selection icon, the Item ID and Title automatically appear in their

Add a New Scheduled Offering Record

Step Activity

View

1. Select Add New Scheduled Offering from the QuickLinks menu.



2. Click the **Item** option button.

Note: **Item** is the default selection.

Select Scheduled Offering Type



3. In the Identify the Scheduled Offering box, click the Search icon next to the Item ID field to find the item for which you want to create the offering.

Selecting the item in this manner will automatically fill in the **Item Type** and **Title** fields.

2. Identify the Scheduled Offering

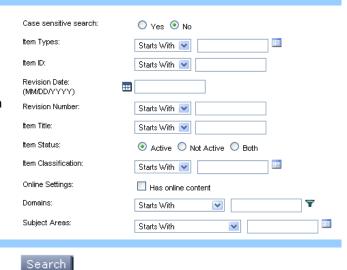
* Item Type:

* Item ID:

Title:

 On the > Search screen, enter the appropriate search criteria.

> Note: See Managing Data Entry and Searches for more detailed information on searching.



5. Click Search.

 Locate the desired Item and select the corresponding Select link.



respective fields

A segment is a unit of time within a Scheduled Offering. Segments enable these units to be associated with resources, such as a location, instructors and equipment.

The Time Zone field defaults to the time zone in which the Scheduled Offering will occur.

Add a New Scheduled Offering Record

Step **Activity**

- 7. Click the **Domain**
 - selection icon to search for and enter a domain.



| New York | SARS-PortalaD-C-RMSOS (DC Training Room (Portals Bidg.))
| ASC (Pan Am Building, PA130)
| Lidentify the Control of the Control

Select Date

* Start Time: (hh:mm AM/PM)

3. Set Up the Segment Start Date: (MM/DD/YYYY

Comfort Suites Inn - Ogden (2250 S. 1200 W. 801-621-2545

View

- From the Facility dropdown list, select the facility where the scheduled offering will take place.
- 9. Click the **Segment Start** Date calendar icon to select and enter a start date.

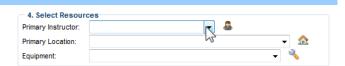
Note: A Scheduled Offering must have at least one segment.

10. Enter a start time in the **Segment Start Time** field.

> Note: Use the following time convention - hh:mm AM/PM.

11. Click the Time Zone drop-down list to search for and enter the correct time zone.

12. In the Select Resources section, click the Primary Instructor drop-down list to search for and select an instructor authorized to teach the Scheduled Offering.



America/New York (Eastern Standard Time)

13. Click the Primary Location drop-down list to search for and select the primary location for the scheduled offering.

Primary Location:

Equipment:

* Time Zone:



14. Click the Equipment dropdown list to search for and select equipment to be reserved for the scheduled offering.

Add a New Scheduled Offering Record

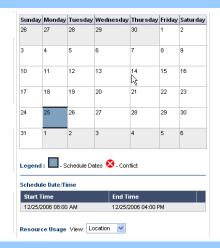
Step Activity

View

15. Click Refresh.

Refresh

16. You may show the schedule dates for any of the reserved resources by pulling down the Resource Usage View Menu.



17. Click Next.



18. The catalog(s) associated with the item will appear. You do not need to click the search icon unless you remove a catalog and then decide include the catalog in the Scheduled Offering.



The search results will reveal only catalogs associated with the item.

19. Click Next.



20. Review the summary screen to confirm that the data for the scheduled offering is correct. If necessary, click **Previous** to return to earlier screens to modify data.



21. When you are sure all data is correct, click Submit to create the record and display the Summary tab.



| Add a New Scheduled Offering Record | | | | | |
|-------------------------------------|--|-------------------------|--|--|--|
| Step | Activity | View | | | |
| 22. | Click the Approval Process ID drop down list to select the approval process associated with the scheduled offering. | Approval Process ID: | | | |
| 23. | Select the Approval Required checkbox if approval is required for users to enroll in the scheduled offering | Approval Required: | | | |
| 24. | Enter the name of the point of contact for the scheduled offering. | Contact: | | | |
| 25. | Enter the point of contact's e-mail address in the Email field. | Email: | | | |
| 26. | Enter the point of contact's Phone and Fax numbers (if available) in their respective fields. | Phone: Fax: | | | |
| 27. | Select or deselect the Active check box to affect the Scheduled Offering's availability. Note: The default setting for the Active check box is active. | Active: | | | |
| 28. | Check the Auto Fill Registration checkbox, if you wish to automatically replace users who withdraw from the scheduled offering with users on the waitlist. | Auto Fill Registration: | | | |
| 29. | Enter Comments to describe the scheduled offering to other administrators. | Comments: | | | |

If you clear the checkbox, the offering is inactive and unavailable for users to view or edit unless they have been assigned permission for inactive items.

date.

recording the enrollments

Add a New Scheduled Offering Record Step **Activity View 30.** In the Edit the Registration Cut-off Date: (MM/DD/YYYY) Registration for the Scheduled Offering section, click the Calendar icon to set the Registration Cut-off Date. This is the last date **31.** Enter the Registration Registration Cut-off Time: when enrollments to (hh:mm AM/PM) Cut-off Time. the offering should be allowed. Users are warned, but not prevented, from making enrollments after this 32. Enter the minimum Minimum Registration: (1000,001)registration needed to conduct the offering, and Maximum Registration: (1000,001)the maximum registration capacity. If you attempt to 33. Check the Self K Self Registration register more users Registration checkbox if than the maximum users should be allowed capacity, you will be to register themselves in warned but not this offering from their prevented from Learning Plan. 34. Click Apply Changes. Apply Chang

| 1. | | | |
|-----|--|--|--|
| 2. | | | |
| 3. | | | |
| 4. | | | |
| 5. | | | |
| 6. | | | |
| 7. | | | |
| 8. | | | |
| 9. | | | |
| 10. | | | |
| 11. | | | |
| 12. | | | |
| 13. | | | |
| 14. | | | |
| | | | |

Edit a Scheduled Offering Record

Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search. Step

1.

2.

4.

Activity

Offerings.

menu.

3. On the > Search screen, enter the appropriate search criteria.

Select the **Learning**

Select Scheduled

Note: See Managing Data Entry and Searches for more detailed information on searching. View

Learning

Cla(^{III})es

Search

Scheduled Offerings

Search Scheduled Offerings

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

Click Search.

5. Locate the desired Scheduled Offering and select the corresponding Edit icon to edit the Scheduled Offering.

Tip: Use **Ctrl+F** to quickly find a Scheduled Offering.

6. Make the appropriate changes to information on the **Summary** tab.

Notifications Cost Calculation Cost Summary

Summary Segments Registration

7. Click Apply Changes.

Apply Changes

8. Click the **Segments** tab and make the appropriate changes.

Notifications Cost Calculation Cost Summary

Summary Segments Registration

9. Click Apply Changes.

Apply Changes

Remind students that required fields are identified by a red asterisk. Although remaining fields are not required, students should complete as many as they feel are necessary.

Inform the students that

Learner/Instructor ID,

Learner/Instructor ID field, select the appropriate option button, and click Add. Inform the students that

Instructor ID, they can

enter it directly in the

select the appropriate

option button, and click

Instructor ID field,

Add.

if they know the

they can enter it

if they know the

directly in the

Edit a Scheduled Offering Record

added as a contact.

Step **Activity** View 10. Click the Registration tab Cost Summary Cost Calculation Pricing: and make the appropriate Registration Segments Contacts changes. Note: To learn more about adding Users to a Scheduled Offering, see **Managing Scheduled** Offering Registrations. To learn more about adding slots to a Scheduled Offering, see Managing Scheduled Offering Slots. 11. Click Apply Changes. Apply Changes **12.** Click the **Contacts** tab. Cost Summary Pricing Catalog Contacts Registration Materials 13. Select Add one or more Enter User/Instructor ID and select Contact Type or add one or more User/Instructor ID and select Contact Type or add one or more instructors from **Users (instructors) from list** to select and enter a ● Instructor ○ User Add contact. Search Users **14.** On the > **Search** screen, enter the appropriate Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search. search criteria. Case sensitive search: O Yes 💿 No Note: See Managing Data User ID: Starts With Entry and Searches for Last Name Starts With more detailed information. First Name: Starts With Middle Initial Starts With User Status: Domains: Starts With 15. Click Search. Search 16. On the Results display, Records per Page 10 💌 Page: 123 «Previous | Next» (30 total records) of 3. Go select the Select check box for each User to be LEARNEROS Learner Bill

LEARNER06

Learner, Charlie

Edit a Scheduled Offering Record

Point out that after the students click Add. the selected person(s) now appears in the **Update** the Contacts for the **Scheduled Offering** section.

Share the following example with students: The entire Scheduled Offering (all segments) may need three-ring binders, but segment two may be the only segment requiring a specific handout. So the binders would be assigned to the Scheduled Offering and the handout to segment two.

Step **Activity** View 17. Click Add to return to the Add Contacts tab. Note: Repeat the last 4 steps to add additional contacts on this tab. **18.** Click the **Materials** tab. Pricing Catalog Chargeback Contacts Materials Custom Fields 19. Select the Add one or add one or more from list more from list link to add material(s). 20. On the > Search screen, Case sensitive search: Yes
No enter the appropriate Material ID: Starts With 💌 search criteria. Description: Starts With 💌 Note: See Managing Data Entry and Searches for more detailed information. 21. Click Search. Search 22. On the Results screen, Lab Kit Indoor select the **Select** check Pre Work box for each material to be added. 23. Select the type of material Pre Work Post Work from the **Type** drop-down

Point out that after students click Add, the selected material appears in the **Update** the Materials for the **Scheduled Offering** section.

list. 24. Click Add to return to the

contacts on this tab.

Materials tab. Note: Repeat the last 4 steps to add additional

Add

Pre Work

Edit a Scheduled Offering Record

Inform students that if they update materials for the Scheduled Offering, then they need to click **Apply Changes** when done.

| Step | Activity | View | | | | | | | |
|--|----------------------|--|------------|------------------------------|--------|----------|--|-----------------------|--|
| 25. Scroll down to the Update the Materials for the Scheduled Offering section and make the appropriate changes. | Material ID | erials for the Sch | Туре | Offset(Day(s)) (1000,001) | Target | | Select All (Quantity (1000,001) | / Deselect All Remove | |
| | LAB-IN LAB-OUT | Lab Kit, Indoor Lab Kit, Outdoor | Pre Work V | 1 | User | Y | 1 | | |
| 26. | Click Apply Changes. | Apply C | hanges | | | | | | |

Tip: If a Scheduled Offering can not be located, search for the Scheduled Offering in other domains. During data entry, the Scheduled Offering may have been mistakenly placed in an incorrect domain.

Copy a Scheduled Offering Record

Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

If the Scheduled Offering is in an incorrect domain, a person with the right permissions will need to move the corresponding record to the correct domain.

Students may want to copy a previously created Scheduled

Offering.

Step **Activity** View 1. Learning Select the **Learning** menu. 2. Select Scheduled **Hems** Offerings. Scheduled Offerings Clad mes 3. Search Scheduled Offerings On the > Search screen, Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search. enter the appropriate search criteria. Case sensitive search: O Yes

No Note: See Managing Data Offering Type: O Item offering type O Schedule Block offering type O Both Entry and Searches for Scheduled Offering ID: Starts With more detailed information on ttem/Schedule Block ID: Starts With searching. Description: Starts With Start Date After: (MM/DD/YYYY) 10/26/2006 Start Date Before: (MM/DD/YYYY) ... 4. Click Search. Search Locate the desired Classroom THG-MSPOWERPOINT-101 (Rev 7/8/2005 11:09 AM MST) Scheduled Offering and Classroom THG-MSPOWERPOINT-101 (Rev 7/8/2005 11:09 AM MST) select the corresponding Edit icon to edit the Scheduled Offering. Tip: Use the Ctrl+F function to quickly find a Scheduled Offering on the screen. 6. Select the corresponding Copy Scheduled Offering... **Copy Scheduled** Offering button. Options:

7. Select the check box(es) corresponding to the element(s) of the existing record that should remain the same.

8. Click the New Start Date calendar icon to select and enter a different start date.

- Copy Group Instance
- Copy New Scheduled Offering to the catalog
- Use item default segment day numbers
- Copy to consecutive Days

Copy a Scheduled Offering Record

Adding a Scheduled
Offering to a catalog is
optional. Some
predetermined
Scheduled Offerings
are set up for required
attendees. Therefore
the Scheduled
Offerings should not be
in the catalog and
available for others to
register.

Inform students that they can also begin the "copy" process by selecting the

appropriate View link on the > Search screen and then clicking Copy Scheduled Offering

| Step | Activity | View |
|------|---|--|
| 9. | Select the appropriate Schedule On check box(es). | *Schedule On: ☑ Monday ☑ Tuesday ☑ Wednesday ☑ Thursday ☑ Friday ☐ Saturday ☐ Sunday |
| 10. | If the original Scheduled Offering had a registration cut-off date, the new offering will cut off registrations the same number of days before the offering. If you change this date, use the Cutoff Date calendar icon to enter a new cutoff date and the Time Zone selection icon to change the time zone. | Override adjusted registration cut-off date Cutoff Date: (MM/DD/YYYY) (hh:mm AM/PM) |
| 11. | Click Next . | Next |
| 12. | Select or deselect the Notification check box (whichever is appropriate) to have AgLearn send email notifications to those persons who will be affected by the changes to this Scheduled Offering. Note: The default setting for the Notification check box is active. | Send Notification: 🔽 |
| 13. | Click Copy. | Сору |

Tip: If a Scheduled Offering can not be located, search for the Scheduled Offering in other domains. During data entry, the Scheduled Offering may have been mistakenly placed in an incorrect domain.

Tip: To avoid data formatting errors, use the **Calendar** icon assistant.

Note: See Managing Data Entry and Searches for more detailed information pertaining to the Calendar icon.

Cancel a Scheduled Offering

Activity

Step

Scheduled Offerings that have enrollees can only be deleted once they are cancelled. The Cancel A Scheduled Offering Assistant provides an opportunity to notify enrollees and those waitlisted and move them to a request list for the Item.

Instruct students to search for their second Scheduled Offering ID.

Remind students that required fields are identified by a red asterisk. Although remaining fields are not required, students should complete as many as they feel are necessary.

1. Select the Learning Learning menu. 2. Select Scheduled Offerings. Scheduled Offerings 3. Search for the **Scheduled** Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search. Offering to be canceled. O Yes

No Case sensitive search: Offering Type: O Item offering type O Schedule Block offering type O Both Scheduled Offering ID: Starts With Item/Schedule Block ID: Starts With Starts With Start Date After 10/26/2006 Start Date Before: (MM/DD/YYYY) 4. Find the Scheduled Classroom THG-MSPOWERPOINT-101 (Rev 7/8/2005 11:09 AM MST) Offering to be canceled Classroom TNG-MSPOWERPOINT-101 (Rev 7/8/2005 11:09 AM MST) and click the Edit icon. 404 On the **Summary** screen, Closed: Close the Scheduled Offering click Cancel the Closed Date: Scheduled Offering. Cancelled: Cancel the Scheduled Offering No Cancelled Date: Verify the Scheduled 403 * Scheduled Offering: Offering and **Cancellation Date.** * Cancellation Date: Modify either as **11/6/2006** (MM/DD/YYYY) necessary. Note: The default date for the cancellation is the current date. A Scheduled Offering can be cancelled on a future date but not a past date. 7. Click Next. Next 8. Click **Next** to skip the **Edit** Next Realized Costs screen.

View

Inform students that for the purposes of this

Cancel a Scheduled Offering

Activity

Sten

training, cost is not being addressed, and as such they should not make any changes to the > Step 1 > Step 2 screen.

| Step | Activity | View |
|------|--|---|
| 9. | Select the Add enrolled, waitlisted and pending Users to the request list for this item check box if it is applicable to this Scheduled Offering. | ✓ Add enrolled, waitlisted and pending Users to the request list for this item |
| 10. | Select the Send Notification to User, Supervisor, Instructor, or Others, and Inactivate the Scheduled Offering check boxes if applicable. | ✓ Send Notification to User ✓ Send Notification to Supervisor ✓ Send Notification to Instructor ✓ Send Notification to Others ✓ Inactivate the Scheduled Offering |
| 11. | Click Next . | Next |
| 12. | Review the summary of cancellation changes. | Scheduled Offering ID: 403 Scheduled Offering Total (\$): 0.00 Request Item For Users: Yes Notify Users: Yes Notify Supervisors: Yes Notify Instructors: Yes Notify Others: Yes Inactivate the Scheduled Offering: Yes |
| | Click Finish. Tip: Canceling a Scheduled Offering can also be accomplished from the Summary tab on the > Search > Search Results > Edit Summary screen within Scheduled Offerings. On the Finished screen, review the Scheduled Offering's status. | Finished Status: • The scheduled offering has been successfully cancelled. |
| | | The scheduled offering has been successfully cancelled. |

View

Close a Scheduled Offering

Inform students that they will use the Close **Scheduled Offering** assistant to close a Scheduled Offering of an Item and/or activity.

Step **Activity View** 1. Select the **Learning** Learning menu. 2. Select Scheduled Offerings. Scheduled Offerings ″jes 3. Search Scheduled Offerings Search for the Scheduled Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of Offering to be closed. values. You can also add or remove search criteria to further refine your search. Case sensitive search: O Yes

No Offering Type: O Item offering type O Schedule Block offering type

Both Scheduled Offering ID: Starts With Item/Schedule Block ID: Starts With Description: Starts With Start Date After 10/26/2006 Start Date Before: (MM/DD/YYYY) 4. Find the Scheduled Classroom THG-MSPOWERPOINT-101 (Rev 7/8/2005 11:09 AM MST) Offering to be closed and Classroom THG-MSPOWERPOINT-101 (Rev 7/8/2005 11:09 AM MST) click the Edit icon. 5. Click the Close the Closed:

Instruct students to search for their third Scheduled Offering ID.

Remind students that required fields are identified by a red asterisk. Although remaining fields are not required, students should complete as many as they feel are necessary.

Scheduled Offering link.

Note: Closing a Scheduled Offering is used for resource and cost verification purposes and may only be completed after the final segment of the scheduled offering has concluded.

Closed Date:

No

Close the Scheduled Offering

Cancelled:

Cancelled Date:

Cancel the Scheduled Offering No

6. Verify the **Scheduled** Offering and Closing Date. Modify either as

necessary.

Note: The closing date defaults to the current date. * Closing Date:

* Scheduled Offering:

403

(MM/DD/YYYY)

11/6/2006

7. Click Next.

Next

8. Click Next.

> Note: This training is not addressing cost at this time.

Next

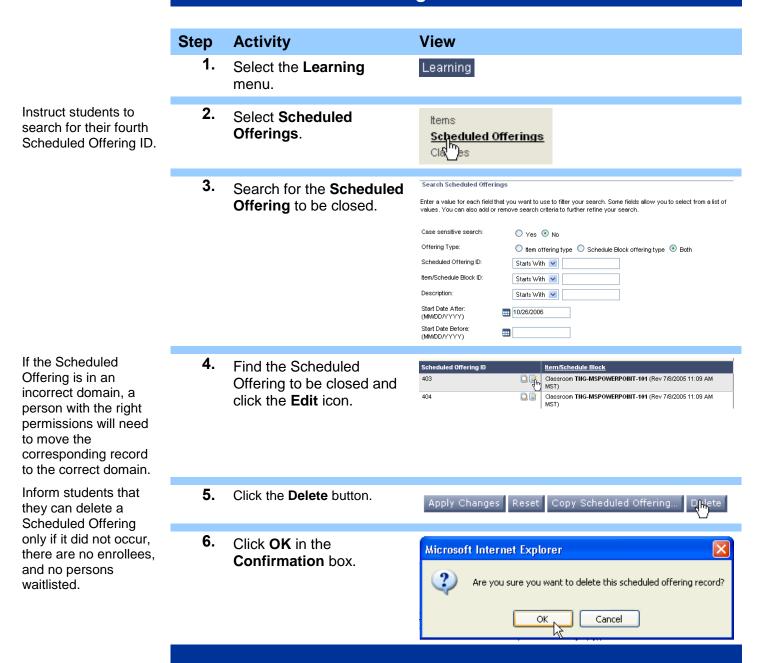
Close a Scheduled Offering

| Step | Activity | View |
|------|---|--|
| 9. | On the Step 3 : Confirm Close screen, review the confirmation. | Step 3: Confirm |
| | | Scheduled Offering ID: 305 |
| | | Scheduled Offering Total (\$): 0.00 |
| 10. | Click Finish. Note: Closing a Scheduled Offering removes it from the calendar. Tip: Closing a Scheduled Offering can also be accomplished from the Summary tab on the > Search > Search Results > Edit Summary screen within the selected Scheduled Offering. | Finish |
| 11. | On the Finished screen, review the Scheduled Offering's status. | Finished Status: |
| | | The scheduled offering has been successfully closed. |
| | | |

Tip: To avoid data formatting errors when entering dates and making selections, use the Calendar and Selection icons

Note: See **Managing Data Entry and Searches** for more detailed information pertaining to the **Selection** and **Calendar** icons.

Delete a Scheduled Offering Record



Tip: If a Scheduled Offering can not be located, search for the Scheduled Offering in other domains. During data entry, the Scheduled Offering may have mistakenly been placed in an incorrect domain.

After introducing the task via the Overview, highlight the roles assigned to perform each subtask.

Managing Segments

A Segment is a unit of division of a Scheduled Offering that facilitates variable resource scheduling. **Managing Segments** involves adding a new Scheduled Offering to the calendar and making corresponding resource assignments. Subtasks pertaining to Segments are accessible via the **Scheduling** menu. Segment-specific subtasks include the following: **View**, **Add**, **Edit a Scheduled Offering Segment**, **Copy Resources to Other Scheduled Offering Segments**, **Copy a Scheduled Offering's Daily Segments** and **Delete a Scheduled Offering Segment**.

A Day-in-the-Life Scenario

A new employee orientation course will need to begin with a one-hour introduction session in Building 57's auditorium, followed by a one-hour hands-on session in the computer lab on the following day.

Notes

View a Scheduled Offering Segment

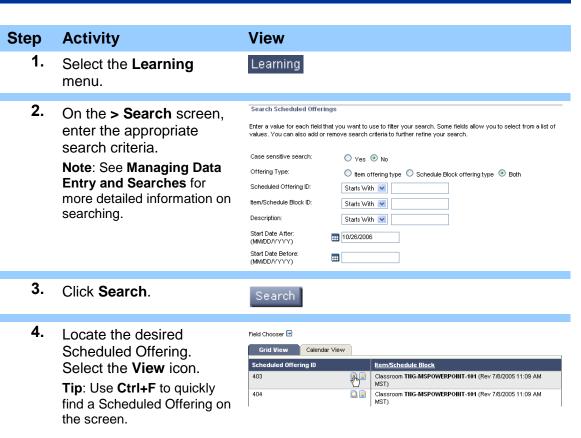
Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

Ask students to search for the first Scheduled Offering created in the Add Scheduled Offering session.

If the Scheduled Offering is in an incorrect domain, a person with the right permissions will need to move the corresponding record to the correct domain.

5.

Click the **Segments** tab.



Notifications

Summary

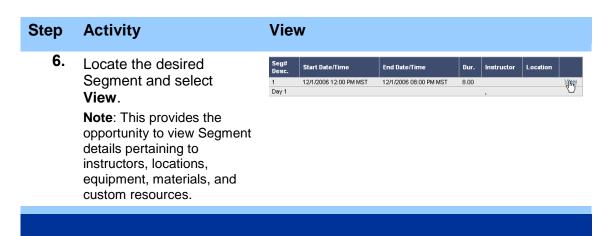
Cost Calculation

Segments

Cost Summary

Registration

View a Scheduled Offering Segment



Tip: If a Scheduled Offering can not be located, search for the Scheduled Offering in other domains. During data entry, the Scheduled Offering may have mistakenly been placed in the default domain.

Add a Scheduled Offering Segment

Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

2. On the > Search screen. enter the appropriate search criteria. Note: See Managing Data

Select the **Learning**

View

Learning

Search Scheduled Offerings

Entry and Searches for more detailed information on searching.

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search. Case sensitive search: O Yes

No

Offering Type: Item offering type
 Schedule Block offering type
 Both Scheduled Offering ID: Starts With Item/Schedule Block ID: Starts With Description: Starts With

Start Date After: Start Date Before: (MM/DD/YYYY) 10/26/2006

3. Click Search.

Activity

menu.

Search

If the Scheduled 4. Locate the desired Offering is in an Scheduled Offering. And incorrect domain, a select the Edit icon. person with the right Tip: Use the Ctrl+F function permissions will need to quickly find a Scheduled to move the Offering on the screen. corresponding record

Step

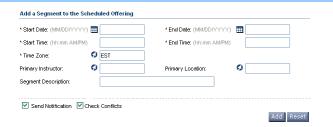
1.

Classroom THG-MSPOWERPOHIT-101 (Rev 7/8/2005 11:09 AM MST) Classroom TNG-MSPOWERPOINT-101 (Rev 7/8/2005 11:09 AM MST) 404

5. Click the **Segments** tab.



Scroll down to the Add a Segment to the **Scheduled Offering** section.



Suggest to students that they use their dateof-birth in the future.

to the correct domain.

7. Click the Start Date calendar icon to select and enter a start date.

* Start Date: (MM/DD/YYYY)

8. Click the End Date calendar icon to select and enter an end date.

* End Date: (MM/DD/YYYY)

Add a Scheduled Offering Segment

| | Step | Activity | View | |
|--|------|---|----------------------|--|
| | 9. | Click the Time Zone selection icon to search for and enter a time zone. Note : The Time Zone field defaults to the time zone in which the Scheduled Offering occurs. | Time Zone: | EST (Eastern Standard Time) |
| | 10. | Enter a Segment start time in the Start Time field. | * Start Time: (hh:n | nm AM/PM) |
| | 11. | Enter a Segment end time in the End Time field. | * End Time: (hh:mi | m AM/PM) |
| Although it is not required to add an instructor when adding an initial Segment, the Update the Segments for the Scheduled Offering section on the Segments tab provides the only opportunity to add a second (or more) instructor to a Segment. | 12. | Pull down the Primary Instructor menu to select the primary instructor. | Primary Instructor | |
| | 13. | Enter a brief description in the Segment Description field. | Segment Description: | |
| nform students that if he Location is already booked, it will not appear on the list. | 14. | Click the Primary Location selection icon to search for and enter the primary location. | Primary Location: | The state of the s |
| | 15. | Select the Send Notification check box to send e-mail notifications to those who will be affected by the changes. | ✓ Send Notifica | tion |
| f a conflict(s) exists a message will appear providing the apportunity to view the conflict(s) by clicking View . | 16. | Select the Check Conflicts check box to check for scheduling conflicts created by adding the Segment. | Check Conflict | s |
| | | | | |

Add a Scheduled Offering Segment

| Step | Activity | View |
|------|--------------------|------|
| 17. | Click Add . | Add |
| | | |

Tip: If a Scheduled Offering can not be located, search for the Scheduled Offering in other domains. During data entry, the Scheduled Offering may have mistakenly been placed in the default domain.

Tip: To avoid data formatting errors use the Calendar and Selection icon assistants.

Note: See **Managing Data Entry and Searches** for more detailed information pertaining to the **Selection** and **Calendar** icons.

Edit a Scheduled Offering Segment

Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

If the Scheduled
Offering is in an
incorrect domain, a
person with the right
permissions will need
to move the
corresponding record
to the correct domain.

Step **Activity View** 1. Learning Select the **Learning** menu. Search Scheduled Offerings 2. On the > Search screen, Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of enter the appropriate values. You can also add or remove search criteria to further refine your search. search criteria. Case sensitive search: O Yes

No Note: See Managing Data Offering Type: O Item offering type O Schedule Block offering type O Both Entry and Searches for Scheduled Offering ID: Starts With more detailed information on Item/Schedule Block ID: Starts With searching. Description: Starts With Start Date After: 10/26/2006 Start Date Before: ... (MM/DD/YYYY) 3. Click Search. Search 4. Locate the desired Classroom THG-MSPOWERPOINT-101 (Rev 7/8/2005 11:09 AM MST) Scheduled Offering. And Classroom THG-MSPOWERPOINT-101 (Rev 7/8/2005 11:09 AM MST) select the Edit icon. Tip: Use Ctrl+F to quickly find a Scheduled Offering on the screen. 5. Click the **Segments** tab. Notifications Cost Calculation Cost Summary Summary Segments Registration Update the Segments for the Scheduled Offering Scroll down to the Update the Segments for the **Scheduled Offering** section. 7. Locate the desired Segment 1 Segment. Start Date (MM/DD/YYYY) 12/1/2006 * End Date (MM/DD/YYYY) 12/1/2006 Start Time (hh:mm AM/PM) 12:00 PM * End Time (hh:mm AM/PM) 08:00 PM Time Zone MST (Mountain Standard Time) Primary Instructor Day 1 Segment Description

Edit a Scheduled Offering Segment

Although it is not required to add an instructor when adding an initial Segment, the Update the Segments for the Scheduled Offering section on the Segments tab provides the only opportunity to add a second (or more) instructor to a Segment.

Step

Activity

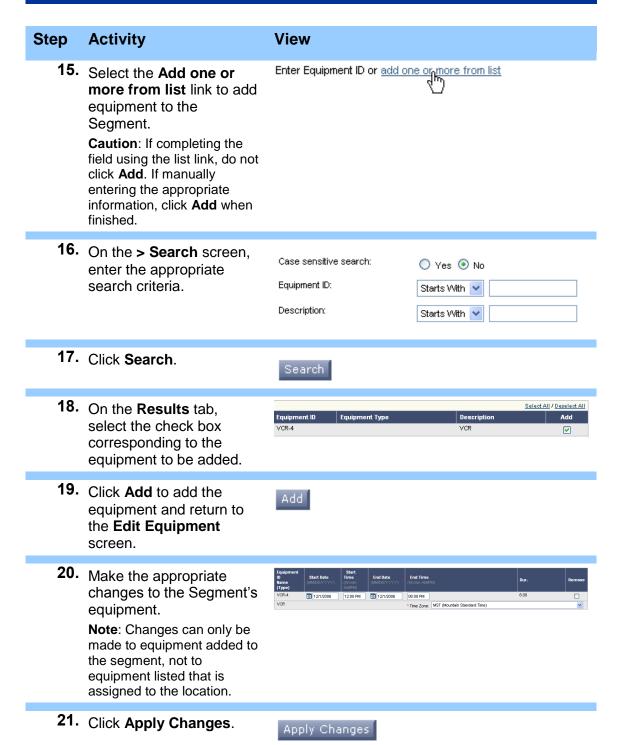
8. Open the **Primary** Primary Instructor: Instructor list to add an instructor to the Segment. Open the **Primary** Primary Location: Location list to add a location to the Segment. 10. Select the Send Send Notification Notification check box to notify interested parties of the changes. 11. Select the Check Check Conflicts Conflicts check box to see if there are any conflicts scheduling the location. 12. Click Apply Changes. Apply Changes **13.** To add an **Instructor** or Edit Resources Location not on the pulldown lists, or to add **Equipment** or **Materials**, click Edit Resources. **14.** Click the **Equipment** tab. Locations Equipment Materials Note: Equipment is being used as an example. Any resources for the segment may be edited in this manner.

View

Equipment and materials can be assigned to a Segment. However, the AgLearn prototype does not support this

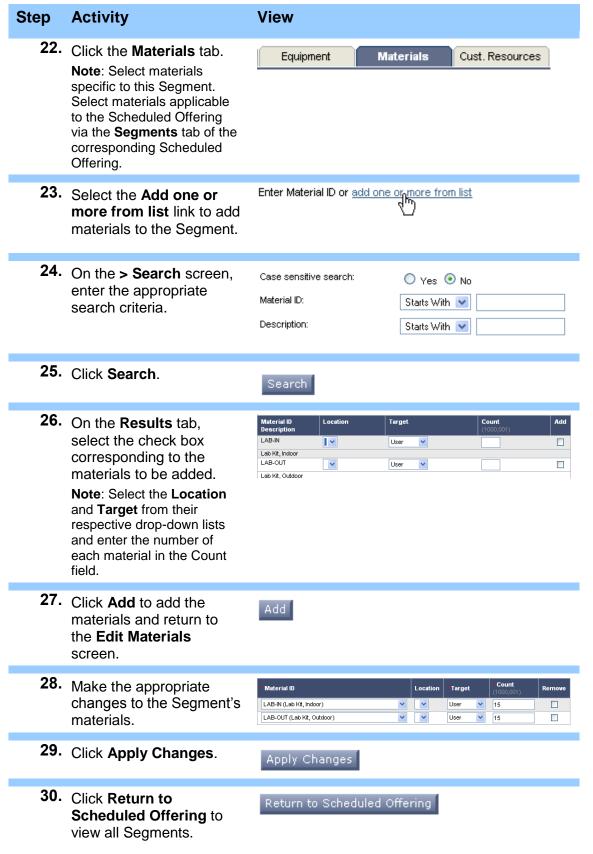
Edit a Scheduled Offering Segment

functionality.



Edit a Scheduled Offering Segment

Share the following example with students: The entire Scheduled Offering (all Segments) may need three-ring binders, but Segment two may be the only Segment requiring a specific handout. So the binders would be assigned to the Scheduled Offering and the handout to Segment two.



Edit a Scheduled Offering Segment

| Step | Activity | View |
|------|----------|------|
| | | |

Tip: If a Scheduled Offering can not be located, search for the Scheduled Offering in other domains. During data entry, the Scheduled Offering may have mistakenly been placed in the default domain.

Copy Resources to Other Scheduled Offering Segments

Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

If the Scheduled Offering is in an incorrect domain, a person with the right permissions will need to move the corresponding record to the correct domain.

to All.

Step **Activity View** 1. Select the **Learning** Learning menu. 2. Search Scheduled Offerings On the > Search screen. Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search. enter the appropriate search criteria. Case sensitive search: O Yes

No Note: See Managing Data Offering Type: Item offering type
 Schedule Block offering type
 Both Entry and Searches for Scheduled Offering ID: Starts With more detailed information on Item/Schedule Block ID: Starts With searching. Description: Starts With Start Date After: 10/26/2006 Start Date Before: (MM/DD/YYYY) 3. Click Search. Search 4. Locate the desired Classroom THG-MSPOWERPOHIT-101 (Rev 7/8/2005 11:09 AM MST) Scheduled Offering. And Classroom TNG-MSPOWERPOINT-101 (Rev 7/8/2005 11:09 AM MST) select the Edit icon. 404 Tip: Use Ctrl+F to quickly find a Scheduled Offering on the screen. 5. Click the **Segments** tab. Notifications Cost Calculation Cost Summary Segments Summary Registration Update the Segments for the Scheduled Offering Scroll down to the Update the Segments for the **Scheduled Offering** section. 7. Locate the Segment Segment 1 containing resources to * Start Date (MM/DD/YYYY) 12/1/2006 * End Date (MM/DD//YYY) 12/1/2006 copy. 12:00 PM • End Time (hh:mm AM/PM) * Start Time (hh:mm AM/PM) 08:00 PM MST (Mountain Standard Time) Note: Resources refers to Primary Location instructor, location, Seament Description Day 1 equipment, material types, Edit Resources | Copy Resources to All | Copy Daily Seg and costs. Select Copy Resources Copy Resources to All

Copy Resources to Other Scheduled Offering Segments

| Step | Activity | View |
|------|---|---|
| 9. | Select each check box corresponding to the individual resources to copy. Note: Select the Copy All check box to copy all Segment resources to the other Segments in this Scheduled Offering. | Choose Resources for Copy Copy All Copy Instructor Copy Location Copy Equipment Copy Material Copy Custom Resource |
| 10. | Select the Check Conflicts check box. Note: The default setting is to check for conflicts. | Check Conflicts: 🗹 |
| 11. | Click Copy . | Сору |

Tip: For an Item/course that requires several days to train, copy all the segments for an entire day and edit the segments rather than add or copy individual segments. See the next subtask, **Copy Daily Segments of a Scheduled Offering**.

Copy Daily Segments of a Scheduled Offering

Remind students that for an Item/course that requires several days to train, it may be useful to copy all the segments for an entire day and edit the segments rather than add or copy individual segments.

Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

If the Scheduled Offering is in an incorrect domain, a person with the right permissions will need to move the corresponding record to the correct domain. Step **Activity View** 1. Select the **Learning** Learning menu. 2. Search Scheduled Offerings On the > Search screen. Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search. enter the appropriate search criteria. Case sensitive search: O Yes

No Note: See Managing Data Offering Type: Item offering type
 Schedule Block offering type
 Both Entry and Searches for Scheduled Offering ID: Starts With more detailed information on Item/Schedule Block ID: Starts With searching. Description: Starts With Start Date After: 10/26/2006 Start Date Before: (MM/DD/YYYY) ... 3. Click Search. Search 4. Locate the desired Classroom THG-MSPOWERPOINT-101 (Rev 7/8/2005 11:09 AM MST) Scheduled Offering. And Classroom TNG-MSPOWERPOINT-101 (Rev 7/8/2005 11:09 AM MST) select the Edit icon. Tip: Use Ctrl+F to quickly find a Scheduled Offering on the screen. 5. Click the **Segments** tab. Cost Calculation Notifications Cost Summary Summary Segments Registration 6. Scroll down to the Update Update the Segments for the Scheduled Offering the Segments for the **Scheduled Offering** section. 7. Locate the Segment Segment 1 comprising the date to * Start Date (MM/DD//////) 12/1/2006 * End Date (MM/DD//YYY) 12/1/2006 copy. Start Time (hh:mm AM/PM) 12:00 PM * End Time (hh:mm All * Time Zone MST (Mountain Standard Time) Primary Location Segment Description: Day 1 Select the corresponding Copy Daily Segments **Copy Daily Segments**

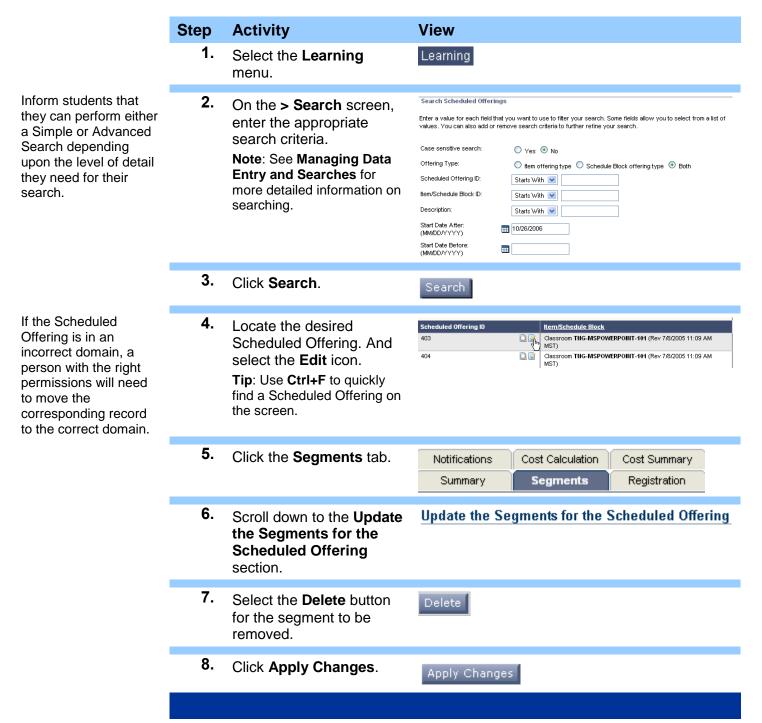
link.

Copy Daily Segments of a Scheduled Offering

| Step | Activity | View |
|------|---|--|
| 9. | On the > Search > Search Results > Edit Segments > Copy Daily Segments screen, enter the desired number of Segment duplications in the Number of Times to Copy field. | * Number of Times to Copy: (1000,001) |
| 10. | Select the Check Conflicts check box. Note : The default setting is to check for conflicts. | Check Conflicts: 🗹 |
| 11. | Select the Send Notification check box. Note : The default setting is to send notifications. | Send Notification 🗹 |
| 12. | Click Copy . | Сору |
| 13. | Scroll down to the Update the Segments for the Scheduled Offering section. | Update the Segments for the Scheduled Offering |
| 14. | Make the appropriate changes to the new Segments. Note: The start and end dates for are automatically set to the next day. | Segment 1 * Start Date (MMDD0YYYY) |
| 15. | Click Apply Changes. | Apply Changes |

Inform students that this is a helpful feature for when there are items requiring several days to complete. Instead of creating new Segments to extend the schedule, simply duplicate a day and edit the date and time information as necessary while maintaining the resources.

Delete a Scheduled Offering Segment



Tip: If a Scheduled Offering can not be located, search for the Scheduled Offering in other domains. During data entry, the Scheduled Offering may have mistakenly been placed in the default domain.

Managing Requests

After introducing the task via the Overview. highlight the roles assigned to perform each subtask.

A Request is a notification specifying that a User wants or needs to complete a specific Item. Usually the request is generated because a Scheduled Offering does not currently exist to accommodate the User's timeframe. A Request does not place a User in active registration or on the Waitlist for any specific Scheduled Offering. Current Item requests can also be viewed using the Item Requests Report. Subtasks pertaining to **Managing Requests** are accessible from the **Learning** menu. Request-specific subtasks include the following: View, Add, and Edit a User Item Request.

A Day-in-the-Life Scenario

You are planning to create an additional Scheduled Offering for the Item Internet Policies when there is sufficient need for it.

Notes

View a User Item Request

find a Learning Event.

Remind students that terms are included in the glossary.

complete definitions of

Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

Step **Activity** View 1. Select the Learning Learning menu. 2. Select Items. frems Seneduled Offerings Classes On the > Search screen, Case sensitive search: O Yes

No enter the appropriate Item Types Starts With search criteria. item ID: Starts With Note: See Managing Data Revision Date: Entry and Searches for (MM/DD/YYYY) more detailed information on Revision Number: Starts With searching. Item Title: Starts With Item Status: Active O Not Active O Both Item Classification Starts With Online Settings: Has online content Domains: Starts With Subject Areas: Starts With 4. Click Search. Search 5. Locate the desired Item. Assessment USDA-CYBERSECURITY-XMPT- 🚨 📝 Placeholder for employees not required to take Security Tip: Use Ctrl+F to quickly

CD-ROM USDA-CYBERSECURITYCD-FY06

(Rev 11/8/2005 11:45 AM EST) Web Based USDA-CYBERSECURITY-FY06 (Rev 11/8/2005 11:42 AM EST) USDA Security Literacy and Basics FY 2006 by CD

USDA Security Literacy and Basics FY 2006

View a User Item Request

Step **Activity View** 6. Select the View icon <u>Item</u> ▲ corresponding to the Assessment USDA-CYBERSECURITY-XMPT- Q desired Item. FY06 (Rev 6/9/2006 09:21 AM EST) CD-ROM USDA-CYBERSECURITYCD-FY06 (Rev 11/8/2005 11:45 AM EST) Web Based USDA-CYBERSECURITY-FY06 (Rev 11/8/2005 11:42 AM EST) 7. Click the **Requests** tab to Materials Objectives **Grading Options** view Users who have **Custom Fields** Requests Rqst Reasons requested the Item. Delivery Data Prerequisites Documents

Remind students that

complete definitions of

terms are included in

Inform students that

Search depending

they need for their

search.

they can perform either

a Simple or Advanced

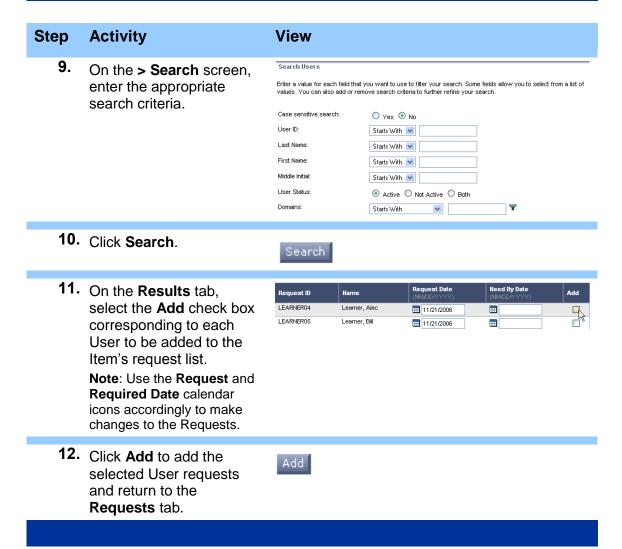
upon the level of detail

the glossary.

Add a User Item Request

Step **Activity View** 1. Select the Learning Learning menu. 2. Select Items. **Ifems** Swieduled Offerings Classes On the > Search screen, Case sensitive search: O Yes No enter the appropriate Item Types: Starts With search criteria. item ID: Starts With Note: See Managing Data Revision Date: Entry and Searches for (MM/DD/YYYY) more detailed information on Revision Number: Starts With searching. Item Title: Starts With Item Status: Active ○ Not Active ○ Both Item Classification Starts With Online Settings: Has online content Domains: Starts With Subject Areas: Starts With 4. Click Search. Search 5. Locate the desired Item. Assessment USDA-CYBERSECURITY-XMPT- Q 2 FY06 (Rev 6/9/2006 09:21 AM EST) Placeholder for employees not required to take Security Literacy and Basics training Tip: Use Ctrl+F to quickly CD-ROM USDA-CYBERSECURITYCD-FY06 (Rev 11/8/2005 11:45 AM EST) USDA Security Literacy and Basics FY 2006 by CD find a Learning Event. Web Based USDA-CYBERSECURITY-FY06 (Rev 11/8/2005 11:42 AM EST) USDA Security Literacy and Basics FY 2006 6. Select the **Edit** icon <u>Item</u> ▲ corresponding to the Assessment USDA-CYBERSECURITY-XMPTdesired Item. FY06 (Rev 6/9/2006 09:21 AM EST) CD-ROM USDA-CYBERSECURITYCD-FY06 (Rev 11/8/2005 11:45 AM EST) Web Based USDA-CYBERSECURITY-FY06 (Rev 11/8/2005 11:42 AM EST) 7. Click the **Requests** tab to Materials Objectives Grading Options view the list of Users **Custom Fields** Requests Rost Reasons requesting the Item. Delivery Data Prerequisites Documents Select the Add one or Add a Request to the Item more from list link to Enter Learner ID or add one or more from list. search for and enter a User.

Add a User Item Request



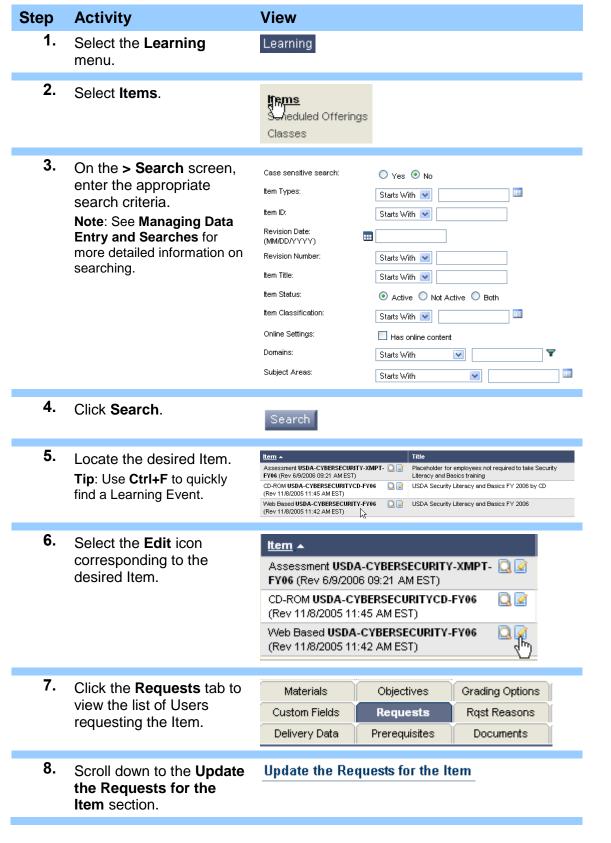
Note: Requests are usually entered here, but AgLearn can generate requests on its own. When a Scheduled Offering is cancelled, AgLearn will ask the administrator whether requests should be generated for Users that were registered or waitlisted for that Scheduled Offering. The second circumstance occurs when a Scheduled Offering with a Waitlist takes place. Requests can be generated for each User on the Waitlist via the Waitlist to Request automatic process.

Edit a User Item Request

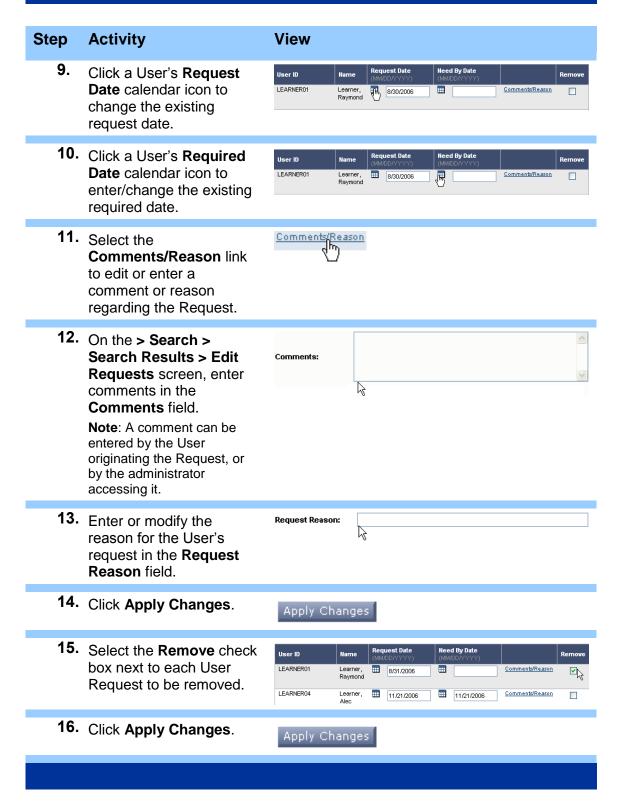
Have students begin with Step #8 as they will need to add a comment regarding the request.

Remind students that complete definitions of terms are included in the glossary.

Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.



Edit a User Item Request



After introducing the task via the Overview, highlight the roles assigned to perform each subtask.

Managing Slots

A Slot is a reservation made by an Organization for enrollments in a Scheduled Offering. Names of specific Users may not be available when an Organization acquires the Slots, but seats on the Scheduled Offering are reserved for that organization until the specific Users are identified. Slots are filled using the **Registration** tab within **Scheduled Offerings**. Subtasks pertaining to Slots are accessible via the **Scheduling** menu. Slot-specific subtasks include the following: **View**, **Add**, **Edit**, **Delete**, and **Fill a Slot**.

A Day-in-the-Life Scenario

AgLearn announced an additional Scheduled Offering for the Sexual Harassment Prevention course that must be completed by all employees hired after December 31st, 2006. The Scheduled Offering will occur in the Fall of 2007. A supervisor knows that he will be hiring 5 new employees.

Notes

View Scheduled Offering Slots

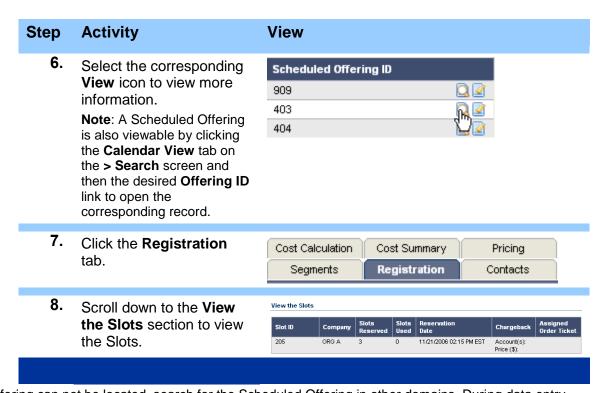
Step **Activity** View 1. Select the **Learning** Learning menu. 2. Select Scheduled Offerings from the left Scheduled Offerings menu. Search Scheduled Offerings On the > Search screen, Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of enter the appropriate values. You can also add or remove search criteria to further refine your search search criteria. Case sensitive search: O Yes No Note: See Managing Data Offering Type: O Item offering type O Schedule Block offering type O Both Entry and Searches for Scheduled Offering ID: Starts With more detailed information on ttem/Schedule Block ID: Starts With searching. Description: Starts With Start Date After 10/26/2006 Start Date Before: (MM/DD/YYYY) 4. Click Search. Search 5. In the Grid View, locate Classroom THG-AS-AGLEARN (Rev 11/16/2006 12:00 AM EST) the desired Scheduled Classroom THG-MSPOWERPOINT-101 (Rev 7/8/2005 01:09 PM EST) Q Classroom TNG-MSPOWERPOINT-101 (Rev 7/8/2005 01:09 PM EST) Offering. Tip: Use Ctrl+F to quickly find a Scheduled Offering on the screen.

Remind students that complete definitions of terms are included in the glossary.

Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

If the Scheduled
Offering is in an
incorrect domain, a
person with the right
permissions will need
to move the
corresponding record
to the correct domain.

View Scheduled Offering Slots



Tip: If a Scheduled Offering can not be located, search for the Scheduled Offering in other domains. During data entry, the Scheduled Offering may have been mistakenly placed in an incorrect domain.

Add Slots to a Scheduled Offering

Inform students that they will be adding Slots to the newly created Scheduled Offering.

Remind students that complete definitions of terms are included in the glossary.

Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

If the Scheduled Offering is in an incorrect domain, a person with the right permissions will need to move the corresponding record to the correct domain. Step **Activity View** 1. Select the Learning Learning menu. 2. Select Scheduled Offerings from the left Scheduled Offerings menu. Cla([™])es 3. On the > Search screen, | Simple Search | Advanced Search | Add New | Help | Scheduled Offerings enter the appropriate search criteria. Search Results Search Scheduled Offerings **Note:** See Managing Data Enter the ID or Description, select the type of search from the drop-down menu, and click "Search" to browse results. Entry and Searches for Enter an exact D and select "Exact" from the drop-down menu to go directly to a record. The search is case sensitive by default. You can choose case insensitive search which applies to criteria typed in. Please note that a case insensitive search could take a long time. more detailed information on searching. Case sensitive search: Yes
 No Offering Type: O Item offering type O Activity offering type O Both Scheduled Offering ID: Starts With Item/Activity ID Starts With Description: Starts With Start Date between: (MM/DD/YYYY) 10/3/2005 and: (MM/DD/YYYY) **=** Status: Active Not Active Both 4. Click Search. Search

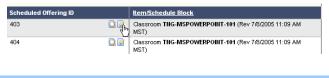
404

5. On the Search Results screen, locate the desired Scheduled Offering.

Tip: Use **Ctrl+F** to quickly find a Scheduled Offering.

 Select the Edit link corresponding to the desired Scheduled Offering.

7. Click the **Registration** tab.



Classroom THG-AS-AGLEARN (Rev 11/16/2006 12:00 AM EST)

Classroom TNG-MSPOWERPOINT-101 (Rev 7/8/2005 01:09 PM EST)

Classroom THG-MSPOWERPOINT-101 (Rev 7/8/2005 01:09 PM EST)



Tell students that an

entity of some type to

belongs. In AgLearn,

the Organization is equivalent to T&L.

Organization is an

which a Learner

Add Slots to a Scheduled Offering

Step **Activity** View 8. Scroll down to the Add Add Slots to the Scheduled Offering Slots to the Scheduled * Organization ID: 🔍 🗆 Offering section. Reservation Date: 11/21/2006 ENROLL(Enrolled) V Reservation Time: 02:23 PM Email confirmation to the Organization Click the Organization ID * Organization ID: search icon to search for and enter the Organization ID reserving Slots in this offering. 10. Click the Reservation Reservation Date: **III** 11/21/2006 Date calendar icon to (MM/DD/YYYY) select and enter a reservation date. Note: The Reservation Date field defaults to the current date. 11. Enter a reservation time Reservation Time: 02:23 PM in the Reservation Time (hh:mm AM/PM) field. Note: The Reservation Time field defaults to the current time. 12. Click the Time Zone Time Zone EST (Eastern Standard Time) 1 selection icon to search for and enter a time zone. Note: The Time Zone field defaults to the time zone in which the Scheduled Offering occurs. 13. Select the Email K Email confirmation to the Organization confirmation to the Organization check box to send the Organization a confirmation message. 14. Enter the number of Slots * Number of Slots: reserved by the (1000,001)Organization in the Number of Slots field.

Add Slots to a Scheduled Offering

| Step | Activity | View | |
|------|--|----------------------|------------------|
| 15. | Select a registration status from the Registration Status drop-down list. | Registration Status: | ENROLL(Enrolled) |
| 16. | Click Add. | Add | |
| | | | |

Tip: If a Scheduled Offering can not be located, search for the Scheduled Offering in other domains. During data entry, the Scheduled Offering may have been mistakenly placed in an incorrect domain.

Tip: To avoid data formatting errors when entering dates, use the Selection and Calendar icon assistants.

Note: See **Managing Data Entry and Searches** for more detailed information pertaining to the **Selection** and **Calendar** icons.

Remind students that

complete definitions of

terms are included in

Inform students that

they can perform either

a Simple or Advanced

upon the level of detail

Use Edit to change the number of reserved

Search depending

they need for their

If the Scheduled

Offering is in an

to move the

incorrect domain, a

person with the right

permissions will need

corresponding record

to the correct domain.

search.

Slots.

the glossary.

Edit Scheduled Offering Slots

Make the appropriate

changes.

Step **Activity View** 1. Select the Learning Learning menu. 2. Select Scheduled Offerings from the left Scheduled Offerings menu. Search Scheduled Offerings On the > Search screen, Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of enter the appropriate values. You can also add or remove search criteria to further refine your search. search criteria. Case sensitive search: O Yes No Note: See Managing Data Offering Type: O Item offering type O Schedule Block offering type Both Entry and Searches for Scheduled Offering ID: Starts With more detailed information on Item/Schedule Block ID: Starts With searching. Description: Starts With Start Date After: 10/26/2006 Start Date Before: (MM/DD/YYYY) 4. Click Search. Search On the Search Results Classroom TNG-AS-AGLEARN (Rev 11/16/2006 12:00 AM EST) screen, locate the desired 403 Classroom THG-MSPOWERPOINT-101 (Rev 7/8/2005 01:09 PM EST) 404 Classroom TNG-MSPOWERPOINT-101 (Rev 7/8/2005 01:09 PM EST) Scheduled Offering. Tip: Use Ctrl+F to quickly find a User. 6. Select **Edit** corresponding Scheduled Offering ID to the desired Scheduled 403 Offering. 404 7. Click the Registration Cost Calculation Cost Summary Pricing tab. Segments Registration Contacts Scroll down to Edit the Edit the Registered Users for the Scheduled Offering Registered Users for the Scheduled Offering.

Edit Scheduled Offering Slots

| Lare | soneduied onering o | |
|------|----------------------|---------------|
| Step | Activity | View |
| 10. | Click Apply Changes. | Apply Changes |
| | | |

Tip: If a Scheduled Offering can not be located, search for the Scheduled Offering in other domains. During data entry, the Scheduled Offering may have been mistakenly placed in an incorrect domain.

the glossary.

search.

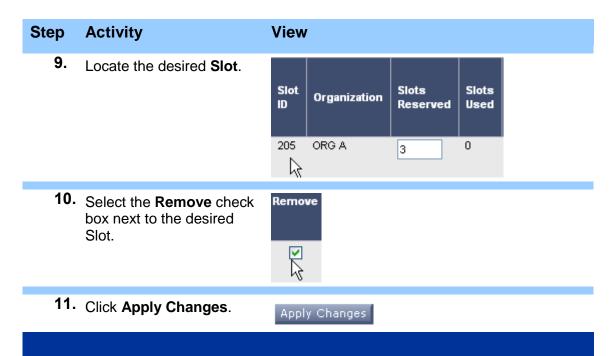
to move the

Delete Slots from a Scheduled Offering

Step **Activity** View 1. Learning Select the Learning menu. 2. Select Scheduled **Hems** Offerings from the left Scheduled Offerings menu. Clad mes Remind students that 3. Search Scheduled Offerings On the > Search screen, complete definitions of Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search. enter the appropriate terms are included in search criteria. Case sensitive search: O Yes No Note: See Managing Data Offering Type: O Item offering type O Schedule Block offering type O Both Entry and Searches for Inform students that Scheduled Offering ID: Starts With more detailed information on they can perform either Item/Schedule Block ID: Starts With searching. a Simple or Advanced Description: Starts With Search depending Start Date After 10/26/2006 upon the level of detail Start Date Before: they need for their 4. Click Search. Search If the Scheduled 5. On the Search Results Classroom TNG-AS-AGLEARN (Rev 11/16/2006 12:00 AM EST) Offering is in an screen, locate the desired Classroom THG-MSPOWERPOINT-101 (Rev 7/8/2005 01:09 PM EST) incorrect domain, a 404 Classroom TNG-MSPOWERPOINT-101 (Rev 7/8/2005 01:09 PM EST) Scheduled Offering. person with the right Tip: Use the Ctrl+F function permissions will need to quickly find a User. corresponding record 6. Select the Edit link to the correct domain. Scheduled Offering ID corresponding to the 403 desired Scheduled 404 Offering. 7. Click the Registration Cost Calculation Cost Summary Pricing tab. Segments Registration Contacts 8. Scroll down to the Edit Edit the Slots for the Scheduled Offering the Slots for the **Scheduled Offering**

section.

Delete Slots from a Scheduled Offering



Tip: If a Scheduled Offering can not be located, search for the Scheduled Offering in other domains. During data entry, the Scheduled Offering may have been mistakenly placed in an incorrect domain.

Remind students that

complete definitions of

terms are included in

Inform students that

Search depending

they need for their

If the Scheduled

Offering is in an

to move the

incorrect domain, a

person with the right

permissions will need

corresponding record to the correct domain.

search.

they can perform either

a Simple or Advanced

upon the level of detail

the glossary.

Fill a Slot

Step **Activity View** 1. Select the Learning Learning menu. 2. Select Scheduled Offerings from the left Scheduled Offerings menu. Search Scheduled Offerings On the > Search screen, Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of enter the appropriate values. You can also add or remove search criteria to further refine your search. search criteria. Case sensitive search: O Yes No Note: See Managing Data Offering Type: O Item offering type O Schedule Block offering type O Both Entry and Searches for Scheduled Offering ID: Starts With more detailed information on Item/Schedule Block ID: Starts With searching. Description: Starts With Start Date After 10/26/2006 Start Date Before: ... (MM/DD/YYYY) 4. Click Search. Search 5. On the Search Results Classroom THG-AS-AGLEARH (Rev 11/16/2006 12:00 AM EST) screen. locate the desired Classroom THG-MSPOWERPOINT-101 (Rev 7/8/2005 01:09 PM EST) 404 Classroom TNG-MSPOWERPOINT-101 (Rev 7/8/2005 01:09 PM EST) Scheduled Offering. Tip: Use the Ctrl+F function to quickly find a Scheduled Offering. 6. Select the Scheduled Scheduled Offering ID Offering Edit link. 403 404 7. Click the Registration Cost Calculation Cost Summary Pricing tab. Segments Registration Contacts 8. Enter criteria or add one or more from list You can also add from request list. Select the Add one or more from list link to select a User.

Tell students they may need to scroll down to the section titled "Scheduled Offering Registration."

Fill a Slot

| 9. On the > Search screen, enter the appropriate search criteria. Learners Learners [Simple Search] Advanced Search Add New Search Search Search Search Search Search Search Search Results | its. |
|--|------|
| Enter the ID or Description, select the type of search from the drop-down menu, and click "Search" to browse reas. Enter an exact ID and select "Exact" from the drop-down menu to go directly to a record. The search is case sens by defaul. You can choose case insensitive search which applies to criteria typed in. Please note that a case insensitive search could take a long time. Case sensitive search: Q yes Q No Learner ID: Last Name: Starts With Y First Name: Middle Initial: Starts With Y Learner Status: Active Q Not Active Both | eset |
| 10. Click Search. | |
| 11. On the Results screen, locate the desired User(s). | Add |
| 12. Select a Slot to assign the User from the Slot ID drop-down list. User Registration Status Slot ID Chargeback Account LEARNER04 Learner, Alec ENROLL(Enrolled) 205 Edit | |
| 13. Select the User's corresponding Add check box. User Registration Status Slot ID Chargeback Account (1000,001.01) Order Ticket [1000,001.01] Order Ticke | Add |
| 14. Click Add. | |
| 15. On the Registration tab, scroll down to the Edit the Registered Learners for the Scheduled Offe for the Scheduled Offering section. | ing |
| 16. Locate the User(s) that were added to verify the Slot ID assignment. User Registration Status Slot ID Edit Registration Status Slot ID 205 11/21/2006 03:03 PM EST Edit | |

Tip: If a Scheduled Offering can not be located, search for the Scheduled Offering in other domains. During data entry, the Scheduled Offering may have been mistakenly placed in an incorrect domain.

Managing Scheduled Offering Registrations

Registration is the act of placing a User's name on the planned list of participants in a specific Scheduled Offering. Subtasks pertaining to Managing Scheduled Offering Registrations are accessible from the Scheduling menu. Registration-specific subtasks include the following: Register/Withdraw a User, View a Scheduled Offering Registration, Edit Registered Users for a Scheduled Offering, Create a Class Roster Registration Report, and Use the Registration Assistant Tool to Register a User for a Scheduled Offering, and Reserve Slots for a Scheduled Offering.

A Day-in-the-Life Scenario

ID.

You are asked to determine which User is Waitlisted for a particular Scheduled Offering. Additionally, you must identify all Users who are Waitlisted for all Scheduled Offerings of a certain Item.

Notes

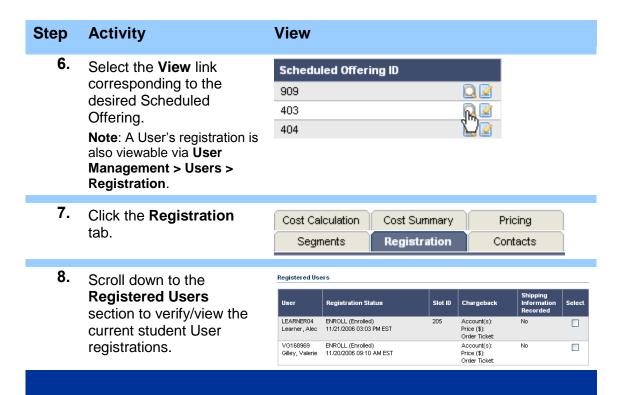
View a Scheduled Offering Registration

Step **Activity** View 1. Select the **Learning** Learning menu. 2. Select Scheduled Offerings from the left Scheduled Offerings menu. On the > Search screen, Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of enter the appropriate values. You can also add or remove search criteria to further refine your search. search criteria. Case sensitive search O Yes No **Note:** See Managing Data Offering Type: O Item offering type O Schedule Block offering type O Both Entry and Searches for Scheduled Offering ID: Starts With more detailed information on Item/Schedule Block ID: Starts With searching. Description: Starts With Start Date After: (MM/DD/YYYY) 10/26/2006 Start Date Before: 4. Click Search. Search 5. Scheduled Offeri On the Grid View screen, Classroom TNG-AS-AGLEARN (Rev 11/16/2006 12:00 AM EST) locate the desired 403 Classroom THG-MSPOWERPOINT-101 (Rev 7/8/2005 01:09 PM EST) 404 Classroom TNG-MSPOWERPOINT-101 (Rev 7/8/2005 01:09 PM EST) Scheduled Offering. Tip: Use the Ctrl+F function to quickly find an Offering

Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

If the Offering is in an incorrect domain, a person with the right permissions will need to move the record to the correct domain.

View a Scheduled Offering Registration



Tip: If a Scheduled Offering can not be located, search for the Scheduled Offering in other domains. During data entry, the Scheduled Offering may have been mistakenly placed in an incorrect domain.

Tip: The **Reports** menu contains a **Registration Status** report listing the status for all registered Users selected for a specific Scheduled Offering(s).

Register a User in a Scheduled Offering

Offering Registration

section.

Step **Activity View** 1. Select the Learning Learning menu. 2. Select Scheduled Offerings from the left Scheduled Offerings menu. Cla(^m)es Search Scheduled Offerings On the > Search screen, Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of enter the appropriate values. You can also add or remove search criteria to further refine your search. search criteria. Case sensitive search: O Yes No Note: See Managing Data Offering Type: O Item offering type O Schedule Block offering type O Both Entry and Searches for Scheduled Offering ID: Starts With more detailed information on Item/Schedule Block ID: Starts With searching. Description: Starts With Start Date After 10/26/2006 Start Date Before: ... (MM/DD/YYYY) 4. Click Search. Search 5. On the Grid View screen, 909 Classroom TNG-AS-AGLEARN (Rev 11/16/2006 12:00 AM EST) locate the desired Classroom THG-MSPOWERPOINT-101 (Rev 7/8/2005 01:09 PM EST) 403 404 Classroom TNG-MSPOWERPOINT-101 (Rev 7/8/2005 01:09 PM EST) Scheduled Offering. Tip: Use the Ctrl+F function to quickly find a User. 6. Select the Edit link Scheduled Offering ID corresponding to the 403 desired Scheduled 404 Offering. 7. Click the **Registration** Cost Calculation Cost Summary Pricing tab. Segments Registration Contacts Scroll down to the Add a Add a User to the Scheduled Offering Registration User to the Scheduled

Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

If the Offering is in an incorrect domain, a person with the right permissions will need to move the record to the correct domain.

Register a User in a Scheduled Offering

Inform the students that if they know the Learner ID, they can enter it directly in the **Learner ID** field.

 Select the Add one or more from list link or the Add from request list link to search for and enter Users.

Activity

Step

Note: A **request list** is a list of Users who have requested to attend the Scheduled Offering.

View

Add a User to the Scheduled Offering Registration

Enter criteria or add one or more from list You can also add from request list

 On the > Search screen, enter the appropriate search criteria.

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

Case sensitive search:

User ID:

Starts With

It is thame:

Starts With

Middle Initiat:

User Status:

Active
Not Active
Both

Domains:

Starts With

Start

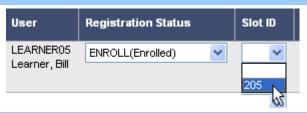
11. Click Search.

Search

Mention to students that this is where they can assign a Learner to a Waitlist. 12. On the Results tab, select a registration status from the Registration Status drop-down list.



13. Select a slot, if appropriate, from the **Slot ID** drop-down list.



14. Select the **Add** check box for each User to be registered to the Scheduled Offering.



Inform students that after clicking the Add button it is unnecessary to click the Apply Changes button in the Edit the Registered Learners for the Scheduled Offering

15. Select the applicable Email confirmation to User, Instructor, Supervisor, and/or Contacts check boxes at the bottom of the User list.

Email confirmations to: User Instructor Supervisor Contacts

Register a User in a Scheduled Offering

| | Step | Activity | View |
|---|------|---|------|
| section of the Registration tab. At this point they should validate the registered Learners. | 16. | Click Add . Note : Be sure to scroll down to the bottom of the screen to verify the addition. | Add |

Tip: If a Scheduled Offering can not be located, search for the Scheduled Offering in other domains. During data entry, the Scheduled Offering may have been mistakenly placed in an incorrect domain.

Edit Registered Users for a Scheduled Offering

Step **Activity View** 1. Learning Select the Learning menu. 2. Select Scheduled Offerings from the left Scheduled Offerings menu. ″jes Search Scheduled Offerings On the > Search screen, Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of enter the appropriate values. You can also add or remove search criteria to further refine your search. search criteria. Case sensitive search: O Yes No Note: See Managing Data Offering Type: O Item offering type O Schedule Block offering type Both Entry and Searches for Scheduled Offering ID: Starts With more detailed information on Item/Schedule Block ID: Starts With searching. Description: Starts With Start Date After 10/26/2006 Start Date Before: ... (MM/DD/YYYY) 4. Click Search. Search Scheduled Offering ID 5. On the Grid View screen, 909 Classroom TNG-AS-AGLEARN (Rev 11/16/2006 12:00 AM EST) locate the desired Classroom THG-MSPOWERPOINT-101 (Rev 7/8/2005 01:09 PM EST) 403 404 Classroom TNG-MSPOWERPOINT-101 (Rev 7/8/2005 01:09 PM EST) Scheduled Offering. Tip: Use the Ctrl+F function to quickly find a User. 6. Select the Edit link Scheduled Offering ID corresponding to the 403 desired Scheduled 404 Offering. 7. Click the Registration Cost Calculation Cost Summary Pricing tab. Segments Registration Contacts 8. Scroll down to the Edit Edit the Registered Users for the Scheduled Offering the Registered Users for

If the Scheduled Offering is in an incorrect domain, a person with the right permissions will need to move the record to the correct domain.

Inform students that

Search depending

they need for their

search.

they can perform either

a Simple or Advanced

upon the level of detail

the Scheduled Offering section.

Select a User's corresponding **Edit** link to make edits to the User's registration information.

Note: Edits can only be made to one User's registration at a time.



Edit Registered Users for a Scheduled Offering

| Step | Activity | View |
|------|---|--|
| 10. | Make the appropriate changes to the Users' registration information for the Scheduled Offering. | User ID: LEARNER04 User Name: Learner, Alec Slot ID: 205 Registration Status: ENROLL(Enrolled) Registration Date: (MMDDYYYY) Registration Tine: (rickmm AMPM) Time Zone: EST (Eastern Standard Time) Send confirmation notification to: User Instructor Supervisor Other |
| 11. | Select the Send Confirmation Notification to User check box to provide Users with a confirmation. Note: Select the Instructors, Supervisors, and Contacts check boxes accordingly to provide them with confirmations. | Send confirmation notification to: User Instructor Supervisor Other |
| 12. | Click Apply Changes . | Apply Changes |

Tip: If a Scheduled Offering can not be located, search for the Scheduled Offering in other domains. During data entry, the Scheduled Offering may have been mistakenly placed in an incorrect domain.

Inform students that

Search depending

they need for their

If the Scheduled

Offering is in an

incorrect domain, a

person with the right

permissions will need

to move the record to

the correct domain.

search.

they can perform either

a Simple or Advanced

upon the level of detail

Withdraw a User from a Scheduled Offering

Step **Activity View** 1. Select the Learning Learning menu. 2. Select Scheduled Offerings from the left Scheduled Offerings menu. Cla([™])es Search Scheduled Offerings On the > Search screen, Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of enter the appropriate values. You can also add or remove search criteria to further refine your search. search criteria. Case sensitive search: O Yes No Note: See Managing Data Offering Type: O Item offering type O Schedule Block offering type Both Entry and Searches for Scheduled Offering ID: Starts With more detailed information on Item/Schedule Block ID: Starts With searching. Description: Starts With Start Date After 10/26/2006 Start Date Before: ... (MM/DD/YYYY) 4. Click Search. Search 5. Scheduled Offering ID On the Results screen, 909 Classroom TNG-AS-AGLEARN (Rev 11/16/2006 12:00 AM EST) locate the desired Classroom THG-MSPOWERPOINT-101 (Rev 7/8/2005 01:09 PM EST) 403 404 Classroom TNG-MSPOWERPOINT-101 (Rev 7/8/2005 01:09 PM EST) Scheduled Offering. Tip: Use the Ctrl+F function to quickly find a Scheduled Offering. 6. Select the Edit link Scheduled Offering ID corresponding to the 403 desired Scheduled 404 Offering. 7. Click the Registration Cost Calculation Cost Summary Pricing tab. Segments Registration Contacts 8. Scroll down to the Edit Edit the Registered Users for the Scheduled Offering the Registered Users for the Scheduled Offering section. 9. Locate the User to be removed (Withdrawn). User Registration Status LEARNER04 ENROLL (Enrolled) Learner, Alec 11/21/2006 03:03 PM EST <u>Edit</u>

Withdraw a User from a Scheduled Offering

| Step | Activity | View |
|------|---|---|
| 10. | Select the Select check box next to the User to be removed (withdrawn) from the Scheduled Offering. | Select |
| 11. | Click Remove . | Remove |
| 12. | Select the Send Confirmation Notification to User check box to provide Users with a confirmation. Note: Scroll down to the bottom of the list of names to select the Instructors, Supervisors, and Contacts you wish to also receive confirmations. | Send confirmation notification to: User Instructor Supervisor Other |
| 13. | Select the Remove associated item from the learning plan check box to remove the Item from the learning plan. | Remove associated item from the learning plan |
| 14. | Click Apply Changes . | Apply Changes |

Tip: If a Scheduled Offering can not be located, search for the Scheduled Offering in other domains. During data entry, the Scheduled Offering may have been mistakenly placed in an incorrect domain.

Create a Class Roster Registration Report

Remind students that required fields are identified by a red asterisk. Although remaining fields are not required, students should complete as many as they feel are necessary.

The Class Roster report displays each selected Scheduled Offering to include in the report and the instructor and Learners who have been scheduled for it.

| Step | Activity | View | |
|------|--|---|--------------------------|
| 1. | Select the Reports menu. | Reports | |
| 2. | Select Learning from the left menu. | + Performance + Learning + Con t | |
| 3. | Select Class Roster. | -Class Progress -Class Roster -Curk (**)a with Related Job Positions | |
| 4. | Enter a title for the report in the Report Title field. Note : The default entry for this field is Class Roster. | Report Title: | Class Roster |
| 5. | Enter a header and footer for the report in their respective fields. | Report Header: Report Footer: | |
| 6. | Click either the Browser or Local File view option to view the report. Note: Browser is the default selection; when selected, it displays the report within the browser. Selecting Local File saves the report to your hard drive to be opened at your convenience. | Report Destination: | Reprowser O Local File |
| 7. | Click the XML, CSV, HTML, or PDF view option for creating the report. Note: The default format is HTML. | Report Format: | ○ XML ○ CSV R HTML ○ PDF |
| 8. | Select the Mask User IDs check box to mask a User's ID. Note: The default setting is for this check box to be selected so User IDs can not be read. | Mask User IDs | |

If students know the

Scheduled Offering ID

roster, they can enter it

Scheduled Offerings

should be separated

for which they want a

directly into the

field. Multiple IDs

with a comma.

Create a Class Roster Registration Report

16. Click Submit Filter.

Step **Activity** View 💟 Page Break Between Records Select the Page Break 9. Between Records check box to break the report between each record. Note: The default setting is for this check box to not be selected. 10. Select the Filter icon. Scheduled Offering: Exact 💙 The Scheduled Offering ID may be typed directly into the box, if known. Search Scheduled Offerings 11. Search for desired Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search. Scheduled Offering. O Yes No Offering Type: Item offering type Schedule Block offering type Both Scheduled Offering ID: Starts With Starts With Description: Starts With Start Date After: (MM/DD/YYYY) 10/26/2006 Start Date Before ... (MM/DD/YYYY) 12. Click Search. Search 13. Select the **Select** check Classroom TNG-MSEXCEL-101 (Re 7/8/2005 01:06 PM EST) box corresponding to each Scheduled Offering for which a roster will be printed. 14. Click Submit Selection. Submit Selection Select All / Deselect All 15. On the View Filter tab, select the Remove check Classroom TNG-MSEXCEL-101 box corresponding to any Select All / Deselect All Scheduled Offering to be removed from the filter. Note: To add a Scheduled Offering to the filter on this tab, enter the Scheduled Offering ID in the Scheduled Offerings field and click Add.

Submit Filter

Create a Class Roster Registration Report

Step Activity View

17. Click Run Report.

Inform students they can click **Schedule Job** to specify a date and time to run the report as a background job or to click **Reset** to revert to system default.

Run Report

Registration Assistant

must be registered or

tool is helpful for

unregistered.

If the Scheduled

Offering is in an

to move the

incorrect domain, a

person with the right

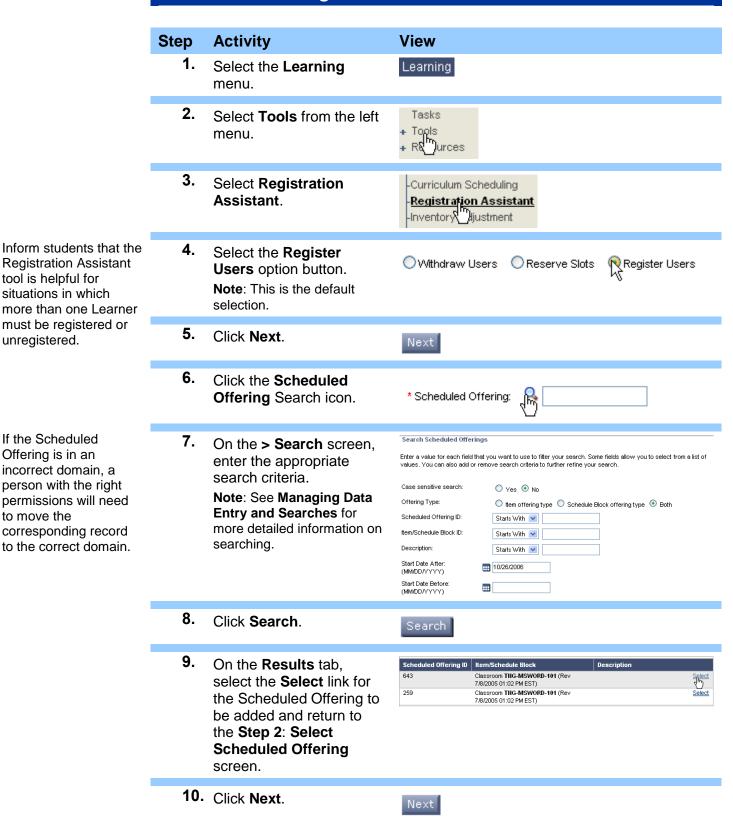
permissions will need

corresponding record

to the correct domain.

situations in which

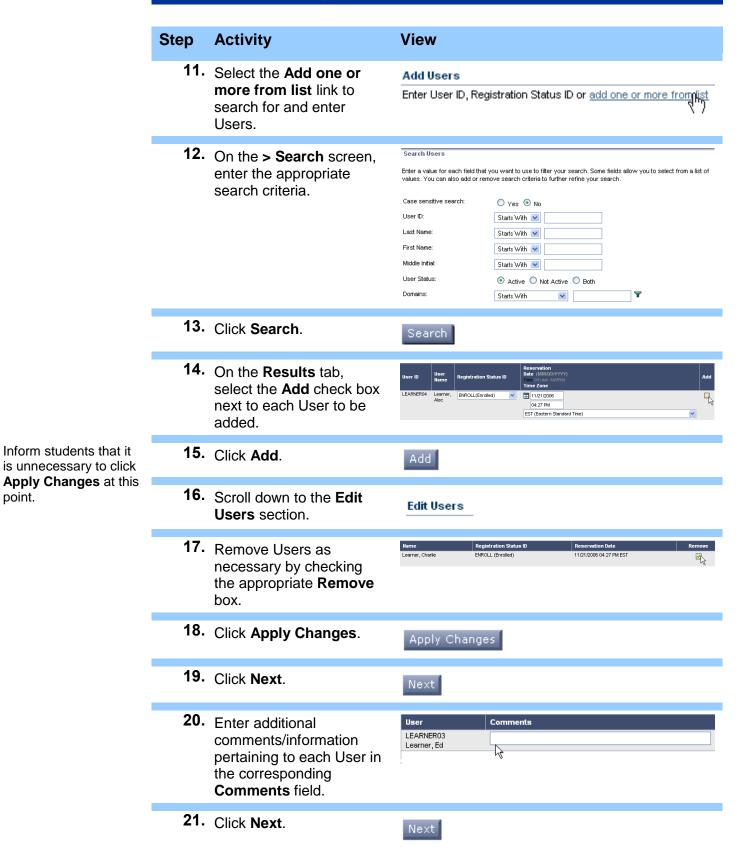
Use the Registration Assistant Tool to Register a User for a Scheduled Offering



Inform students that it

point.

Use the Registration Assistant Tool to Register a User for a Scheduled Offering



Use the Registration Assistant Tool to Register a User for a Scheduled Offering

Inform students that for the purposes of this training cost is not being addressed and as such they should not make any changes to the **Step 5: Edit Financial Data** screen.

| Step | Activity | View |
|------|--|---|
| 22. | Click Next to skip the Step 5 : Edit Financial Data screen. | Next |
| 23 | Select the Email | |
| 20. | confirmations to Users, Instructors, Supervisors, and/or Contacts check boxes if it is applicable. | Email confirmations to: Users Pinstructors Supervisors Contacts |
| 24. | Click Finish . | Finish |
| 25 | Davious the Cahadulad | |
| 20. | Offering's registration status on the Finish | Finished |
| | | Status: |
| | screen. | All registrations in this scheduled offering were successful. |
| 25. | status on the Finish | Status: |

Tip: If a Scheduled Offering can not be located, search for the Scheduled Offering in other domains. During data entry, the Scheduled Offering may have been mistakenly placed in an incorrect domain.

Tip: When using the Registration Assistant tool to Withdraw a student, steps are similar to those above, with the exception of two elements:

- 1. Select the **Withdraw** check box for those students to be Withdrawn.
- 2. On the final step, select the **Remove associated item from the learning plan** check box to remove the Item from the User's Learning Plan.

Tip: To avoid data formatting errors, use the Selection icon assistant.

Note: See Managing Data Entry and Searches for more detailed information pertaining to the Selection icon.

If the Scheduled

Offering is in an

incorrect domain, a

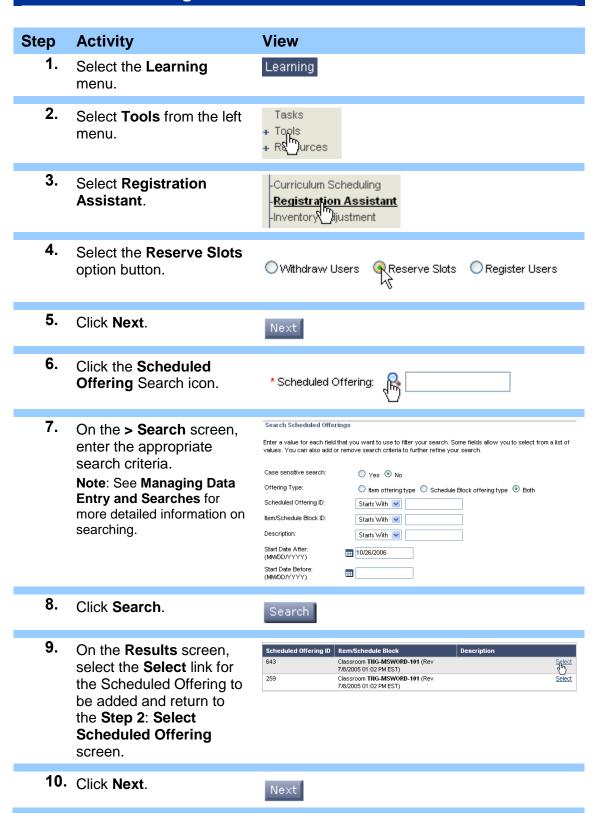
person with the right

permissions will need

to move the record to

the correct domain.

Use the Registration Assistant Tool to Reserve Slots for a Scheduled Offering



Use the Registration Assistant Tool to Reserve Slots for a Scheduled Offering

Step **Activity View** 11. Click the Organization ID Organization ID Search icon to select and enter an Organization ID. 12. On the > Search screen, Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search. enter the appropriate search criteria. Case sensitive search: O Yes No Organization ID: Starts With Description: Starts With Starts With Organization Group Starts With 13. Click Search. Search 14. Select the Select link next to the Organization to be GoLearn GoLearn added. ORG B SBSI **15.** Enter the required Slots number of slots in the Slots field. 16. Select a status from the Registration **Registration Status** Status ID change the fields if the drop-down list. default field is accurate. Note: The default is set to ENROLL (Enrolled) Enrolled. ENROLL (Enrolled) 17. Click the Calendar icon to Reservation select and enter a Reservation date. Note: The default is set to 11/22/2006 the current date.

Remind students that

they do not need to

Use the Registration Assistant Tool to Reserve Slots for a Scheduled Offering

Activity View Step Remind students that 18. Enter the reservation time Time they do not need to in the **Time** field. change the fields if the default field is accurate 01:41 PM 19. Click the Time Zone Time Zone Selection icon to select and enter a Time Zone. EST (Eastern Standard Time) 20. Click Add. Add 21. Click Next. Next 22. Enter additional comments/information about the Organization in the Comments field. 23. Click Next. Next 24. Click Next to skip the Next Step 5: Edit Financial Data screen. 25. Select the Email ☑ Email confirmations to Organizations confirmations to **Organizations** check box if it is applicable to this Scheduled Offering registration. 26. Click Finish. Finish 27. Review the Scheduled Finished Offering's registration status on the Finish screen. · All slot reservations in this scheduled offering were successful.

Tip: To avoid data formatting errors use the Calendar and Selection icon assistants.

| Note: See Managing Data Entry and Searches for more detailed information pertaining to the Selection and Calend cons. | lar |
|---|-----|
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Managing Curricula Records

A Curriculum is a grouping of learning. The Requirements, Subcurricula, Items, and Documents are grouped to make them easier to assign, track, and maintain. Curricula management tasks are accessible from the Learning > Curricula menu. Managing Curricula tasks include: Creating Requirements, View, Add, Edit, Copy, and Delete a Curriculum Record.

A Day-in-the-Life Scenario

All new employees are required to take a series of learning events, including an orientation class, privacy basics, security literacy, and ethics and civil rights training. The easiest way to assign and track this is to create a curriculum containing all of the required Items and verify its completion.

Requirements

Requirements are intended to give the administrator, and the User, more flexibility. Now the User can choose several Items from a larger pool, or complete any number of Items from the pool, so long as a minimum number of contact hours (or credits) is met. The original parameters are set by the administrator; the User then makes specific choices to best suit his/her needs and preferences.

Requirements are assigned to Users through curricula. The administrator associates a requirement with a curriculum, and then assigns the curriculum to a User, thus providing an easy-to-use mechanism for the User to complete the requirement. Requirements can use period-based assignments, just as curricula could before, so that mandatory retraining intervals can be enforced.

Space and time restrictions prohibit a comprehensive discussion of all the permutations possible with requirements. The fundamentals will be discussed here; more detailed information will be available in the online AgLearn Administrators' Reference.

There are three basic types of requirements. You may specify a number of Items from a pool, a number of hours or credits from a pool of Items, or just a number of hours or credits. Examples of each:

- Items from a pool of Items The requirement may be for the User to complete
 any three from a pool of five Items (two from a pool of three, four of six, etc.).
 Ethics training, for example, requires the User to take three Items each year,
 from a pool of seventeen.
- Hours (or credits) from a pool of Items The requirement may be to complete
 fifteen hours from a pool of Items; credits, or Continuing Professional Education
 units (CPE) may also be used. Some certifications require Users to attain a
 specified number of CPE units in their field each year to retain their certification.
- Hours (or credits) from any Items An agency or organization may require any
 or all of its employees to complete forty hours a year of training, regardless of
 the discipline or subject.

Like many things in AgLearn, creating requirements is not difficult, but it has to be done correctly. Below are the steps required to create each of the three major requirements.

| Creating a New Requirement: Items from a Pool of Items | | | | |
|--|--|--|--|--|
| Step | Activity | View | | |
| 1. | Select the Learning menu. | Learning | | |
| 2. | Select Requirements . | Curricula Requirements Chamber The Communities | | |
| 3. | Select Add New . | Search Adri New Help | | |
| 4. | In the Add New Requirement module, go to the Requirement Type drop-down list and choose # Items from Pool of Items. | * Requirement Type: # Hours of specified Hour Type # Hours of specified Hour Type # Hours of specified Hour Type # Hours of specified Hour Type from Pool of Items Description: # Items from Pool of Items | | |
| 5. | Type an ID and Description for the requirement. | * ID: Description: | | |
| 6. | Type a Domain ID or search for one by clicking the Search icon Q. | * Domain: PUBLIC | | |
| 7. | Accept the default Creation Date, type a different date, or click the Calendar icon to select a date. | * Creation Date: 11/22/2006 (MM/DD/YYYY) | | |
| 8. | Uncheck the Active checkbox if you wish to make the requirement inactive. (Requirements are active upon creation by default.) | Active: | | |
| 9. | Type Comments if you wish. | Comments: | | |
| 10. | Click Next. | Next | | |

Creating a New Requirement: Items from a Pool of Items **Activity** Step View **11.** Add Items to the **Item** Create Item Pool Pool by clicking the Add Enter Item ID or add one or more from list Item Type Item ID one or more from list link. Note: The number of Items must be equal to or greater than the number entered into the **Required Number** of Items field in Step 12. 12. Click Add after each Item Add selected until you have all the Items needed for the pool. **13.** Type the Required Select Hour Type and enter Required Hours Number of Items. **Note**: The required number * Required Number of Items: of Items must be equal to or B greater than the number of Items in the pool. 14. Click the Add button Previous Add Reset nearest the top of the page.

Creating a New Requirement: Hours of a Specified Type from a Pool of Items Step **Activity View** 1. Select the Learning Learning menu. Curricula 2. Select Requirements. Requirements (munities 3. Select Add New. Search | Adri New | Help | 4. In the Add New * Requirement Type: # Hours of specified Hour Type Requirement module, go # Hours of specified Hour Type * ID: to the Requirement Type # Hours of specified Hour Type from # Items from Pool of Items Description: drop-down list and choose # Hours of specified Hour Type from Pool of Items. Type an ID and * ID: **Description** for the Description: requirement. 6. Type a **Domain ID** or PUBLIC * Domain: search for one by clicking the Search icon Q. Accept the default Creation Date: 11/22/2006 Creation Date, type a (MM/DD/YYYY) different date, or click the Calendar icon uto select a date. 8. Uncheck the Active ~ Active: checkbox if you wish to make the requirement inactive. (Requirements are active upon creation by default.) Type Comments if you wish. Comments: 10. Click Next. Next

Creating a New Requirement: Hours of a Specified Type from a Pool of Items

Activity Step **View** 11. Select the Hour Type Select Hour Type and enter Required Hours from the drop-down list. * Hour Type: Total Hours Total Hours * Required Hours: Credit Hours Contact Hours Cpe Hours 12. Enter the Required * Required Hours: Hours (i.e., hours of the B required type needed to fulfill the requirement). **13.** Add at least one Item to Create Item Pool the Item Pool by clicking Enter Item ID or add one or more from list the Add one or more Item Type Item ID from list link in the **Create Item Pool** module. 14. Click Add after each Add addition until you have the complete pool. 15. When all Items have been Previous added, click the Add button nearest the top of the page.

| Creating a New Requirement: Hours of a Specified Hour Type | | | | |
|--|--|---|--|--|
| Step | Activity | View | | |
| 1. | Select the Learning menu. | Learning | | |
| 2. | Select Requirements . | Curricula Requirements Channities | | |
| 3. | Select Add New . | Search Ad ri New | Help | |
| 4. | In the Add New Requirement module, go to the Requirement Type drop-down list and choose # Hours of specified Hour Type. | * Requirement Type: * ID: Description: | # Hours of specified Hour Type # Hours of specified Hour Type # Hours of specified Hour Type from Pool of Items # Items from Pool of Items | |
| 5. | Type an ID and Description for the requirement. | * ID: Description: | | |
| 6. | Type a Domain ID or search for one by clicking the Search icon Q. | * Domain: | PUBLIC | |
| 7. | Accept the default Creation Date, type a different date, or click the Calendar icon to select a date. | * Creation Date: (MM/DD/YYYY) | 11/22/2006 | |
| 8. | Uncheck the Active checkbox if you wish to make the requirement inactive. (Requirements are active upon creation by default.) | Active: | V | |
| 9. | Type Comments , if you wish. | Comments: | | |
| 10. | Click Next. | Next | | |

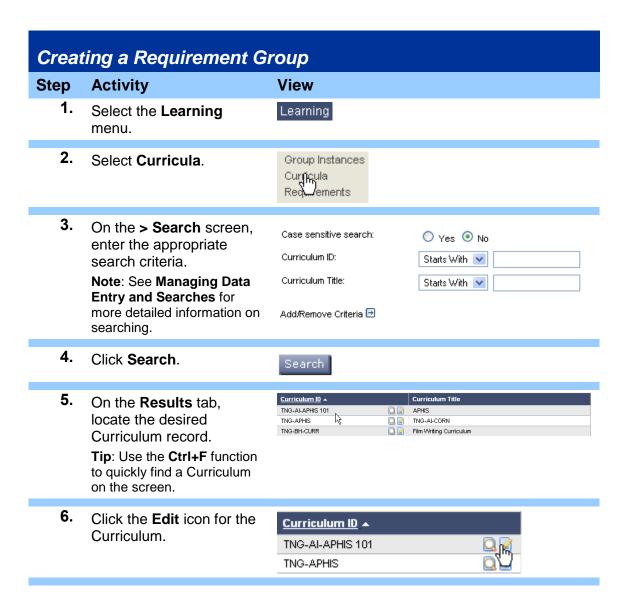
Creating a New Requirement: Hours of a Specified Hour Type View **Activity** Step 11. Select the Hour Type Select Hour Type and enter Required Hours from the drop-down list. * Hour Type: Total Hours Total Hours * Required Hours: Credit Hours Contact Hours Cpe Hours 12. Enter the Required * Required Hours: Hours (i.e., hours of the ß required type needed to fulfill the requirement). 13. Click the Add button. Add Reset Previous

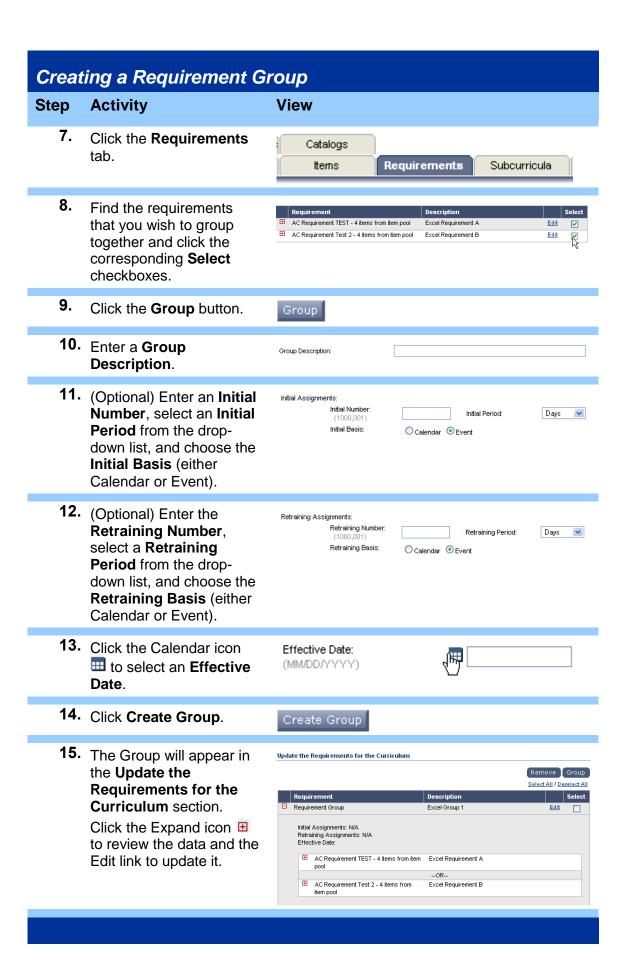
Requirement Grouping

Requirements can be assigned to a curriculum individually, in multiples, or in groups. When assigned individually, the requirement must be fulfilled for the curriculum to be considered complete. When multiple requirements are assigned to a curriculum, **all** requirements must be fulfilled for the curriculum to be considered complete.

Requirement Groups allow administrators to assign multiple requirements to a curriculum, and leave it to the User to decide which requirement to fulfill to complete the curriculum.

For example, if a curriculum has two standalone requirements, A and B, the User must fulfill Requirement A *and* Requirement B for the curriculum to be completed. If Requirements A and B are grouped together, the User may fulfill either Requirement A *or* Requirement B to complete the curriculum.





View a Curriculum Record Step **Activity** View 1. Select the Learning Learning menu. 2. Group Instances Select Curricula. Curricula Requiements 3. On the > Search screen, Case sensitive search: O Yes No enter the appropriate Curriculum ID: Starts With search criteria. Note: See Managing Data Curriculum Title: Starts With Entry and Searches for more detailed information on Add/Remove Criteria 🔁 searching. 4. Click Search. Search On the **Results** tab. TNG-AI-APHIS 101 APHIS locate the desired TNG-APHIS TNG-AI-CORN TNG-BH-CURR Film Writing Curriculum Curriculum record. Tip: Use the Ctrl+F function to quickly find a Curriculum on the screen. Select the corresponding Curriculum ID . View icon to view more

If the Curriculum is in an incorrect domain, a person with the right permissions will need to move the record to the correct domain.

After selecting the View link, the > Search > Search Results > View Summary screen appears.

Remind students that

remaining fields are not

many as they feel are

required fields are

identified by a red

asterisk. Although

required, students should complete as

necessary.

Add a Curriculum Record Step **Activity View** 1. Select the **Learning** Learning menu. 2. Select Curricula. Group Instances Curricula Requiements 3. Select the Add New link. Search | Adri New | Help | 4. Enter the curriculum ID in * Curriculum ID: the Curriculum ID field. ß Note: Check with your agency lead for the proper AgLearn naming convention. 5. Enter a title for the new Title: curriculum in the Title L. field. 6. Click the Creation Date Create Date: **11/20/2006** Calendar icon to select (MM/DD/YYYY) and enter a creation date. 7. Select the **Active** check Active: box if the Curriculum is active. 8. Click the **Domain** Search PUBLIC * Domain: icon to search for and enter a domain. Note: Domain is a required field. 9. NUT (NUT) Click the Curriculum PROC (Procurement) Type selection icon to PROG (Programs) search for and enter a RISK_MGMT (Risk Management) curriculum type. SCIENCE (Science) SEC (Security) Curriculum Type:

Inform students they can select the Help link to locate context sensitive help regarding field definitions on each screen.

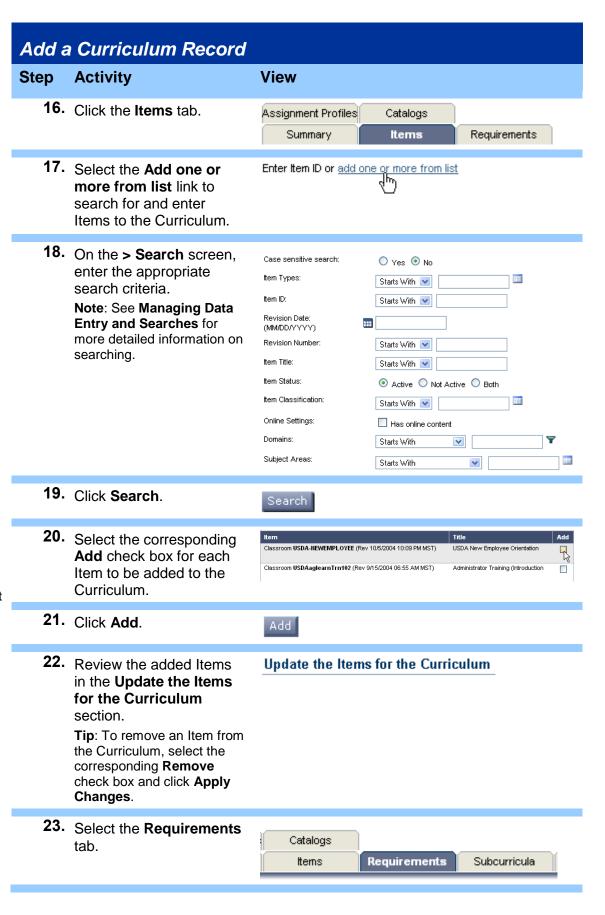
Add a Curriculum Record Step **Activity** View 10. Click the Basis Date Basis Date: ## 7/12/2005 Calendar icon to select (MM/DD/YYYY) and enter a basis date. Note: The Basis Date defines the beginning point of the time periods which are built using the initial assignment information or the retraining assignment information. 11. Select the Force Force Incomplete: **Incomplete** check box to have the system calculate the Item's completion status based on the User's latest attempt at completing the Item. Note: If the User's latest attempt is incomplete, the system will calculate the expiration and required dates based on the date/time of the last unsuccessful attempt. 12. Enter a curriculum Description: description in the **Description** field. 13. Click Add. Add **Caution**: A Validation Error message will appear if all required fields are not complete. 14. Review and edit the Assignment Profiles Catalogs information displayed on Summary Items the **Summary** tab. 15. Click Apply Changes. Apply Changes Caution: Do not select a different tab prior to clicking Apply Changes or all changes and modifications

After clicking the Add button, the > Search > Search Results > Edit Summary screen appears.

will be lost.

After selecting the Items tab, the > Search > Search Results > Edit Items screen appears.

If the Item is in an incorrect domain, a person with the right permissions will need to move it to the correct domain.



Add a Curriculum Record **Activity** View Step 24. Select the Add one or add one or more from list more from list link to search for and enter Requirements to the Curriculum. 25. On the > Search screen, Case sensitive search: O Yes No enter the appropriate Requirement Type: search criteria. Starts With 💌 Note: See Managing Data ID: Starts With Entry and Searches for Status: Active O Not Active O Both more detailed information on searching. 26. Click Search. Search 27. Select the corresponding AC Requirement TEST - 4 items from item pool Excel Requirement A Add check box for each AC Requirement Test 2 - 4 items from item pool Excel Requirement B Requirement to be added to the Curriculum. 28. Click Add. Add 29. Select the Subcurricula Requirements Subcurricula Documents tab. 30. Select the Add one or Enter Curriculum ID or add one or more from list more from list link to search for and enter Subcurricula into the Curriculum. 31. On the > Search screen, Case sensitive search: O Yes No enter the appropriate Curriculum ID: Starts With search criteria. Note: See Managing Data Curriculum Title: Starts With Entry and Searches for more detailed information on Add/Remove Criteria 🗗 searching. 32. Click Search. Search **33.** Select the corresponding Curriculum ID FS-Safety Safety and Health Awareness Add check box for each FSR1_SafetyQual Health and Safety Subcurriculum to be added to the Curriculum.

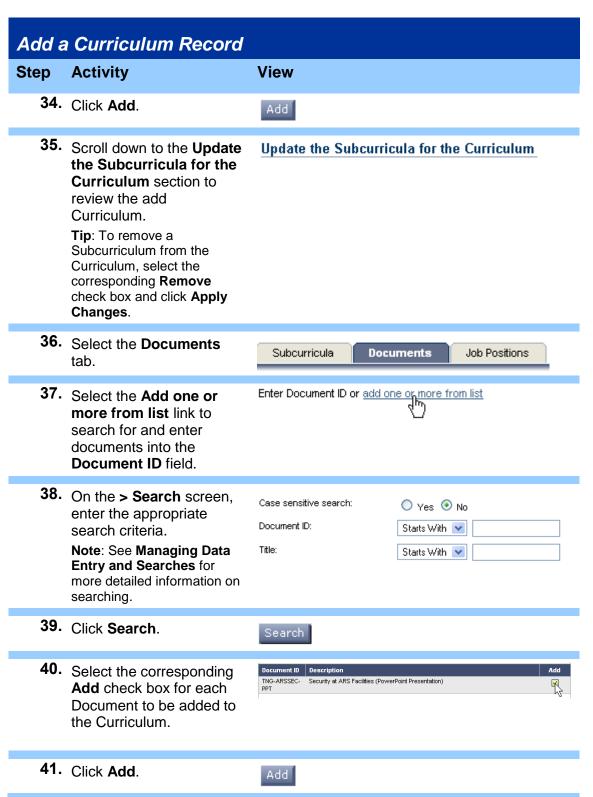
well. For example, CPR Training can be a stand-alone Curriculum or a Subcurriculum of other Curricula.

another Curriculum as

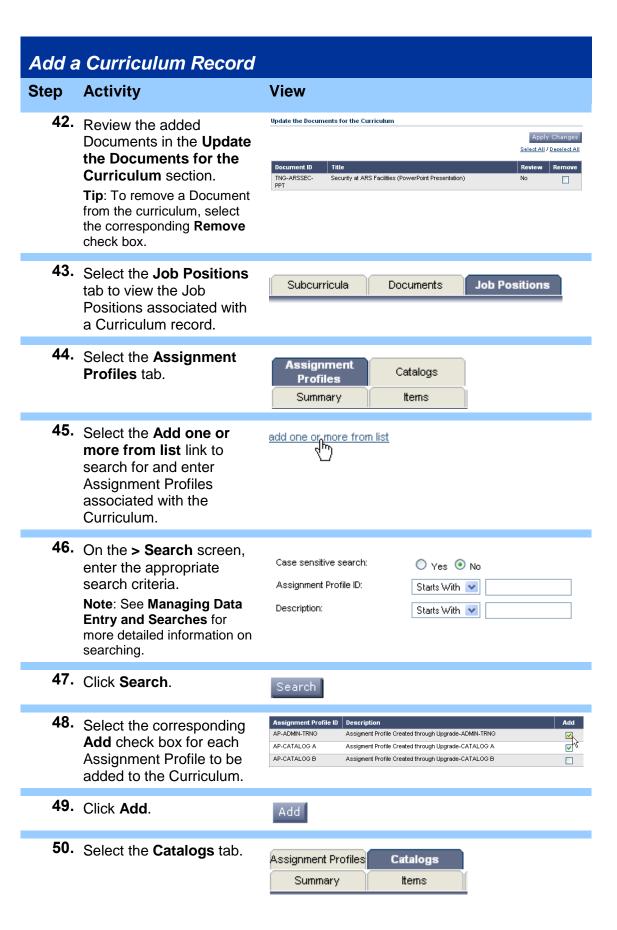
Curricula can stand

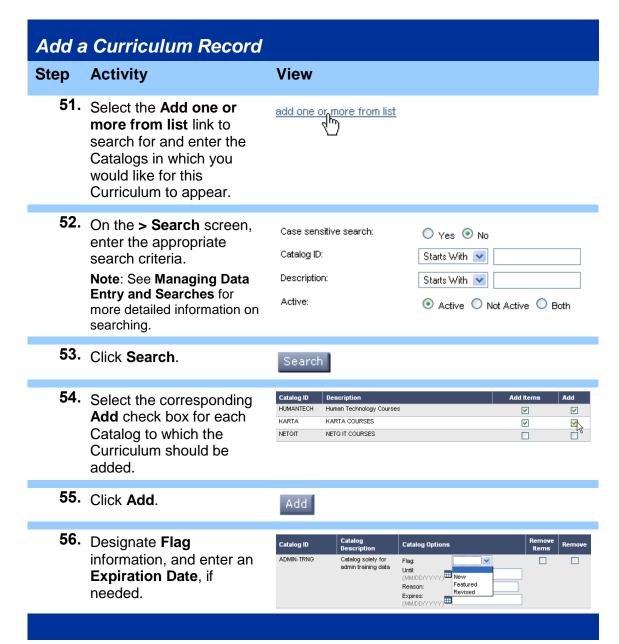
alone or be part of

If a Subcurriculum is in an incorrect domain, a person with the right permissions will need to move it to the correct domain.



If the Item is in an incorrect domain, a person with the right permissions will need to move it to the correct domain.





Caution: Do not use the browser **Back** button when using AgLearn – use the menus, links, and breadcrumbs in AgLearn to navigate.

Tip: If a Curriculum, Item or Document can not be located, search for the Curriculum, Item or Document in other domains. During data entry, the Curriculum, Item or Document may have been mistakenly placed in an incorrect domain.

Inform students that

Search depending

they need for their

search.

domain.

they can perform either

a Simple or Advanced

upon the level of detail

If a Curriculum is in an

incorrect domain, a

person with the right

permissions will need

to move it to the correct

Edit a Curriculum Record Step **Activity View** 1. Select the **Learning** Learning menu. 2. Select Curricula. Group Instances Curricula Requiements On the > Search screen, Case sensitive search: O Yes No enter the appropriate search criteria. Curriculum ID: Starts With 💌 **Note**: See Managing Data Curriculum Title: Starts With Entry and Searches for more detailed information on Add/Remove Criteria 🗗 searching. 4. Click Search. Search 5. On the **Search Results** TNG-AI-APHIS 101 Q 📝 APHIS screen, locate the desired TNG-APHIS TNG-AI-CORN TNG-BH-CURR Rilm Writing Curriculum Curriculum Record. Tip: Use the Ctrl+F function to quickly find a Curriculum on the screen. 6. Select the corresponding Curriculum ID . Edit link. TNG-AI-APHIS 101 TNG-APHIS 7. Make the appropriate Assignment Profiles Catalogs changes to the Summary Items information on the **Summary** tab. Caution: Do not select a different tab prior to clicking Apply Changes or all changes and modifications will be lost. 8. Click Apply Changes. Apply Changes 9. Select the **Items** tab. Assignment Profiles Catalogs Summary Items Requirements

If a Curriculum is in an

incorrect domain, a

domain.

person with the right

permissions will need

to move it to the correct

Edit a Curriculum Record Step **Activity** View 10. Select the Add one or add one or more from list more from list link to search for and enter Items into the Curriculum record. 11. On the > Search screen, Case sensitive search: O Yes No. enter the appropriate Item Types: Starts With search criteria. Starts With Note: See Managing Data Revision Date: Entry and Searches for ... (MM/DD/YYYY) more detailed information on Revision Number Starts With searching. Item Title: Starts With Item Status: Item Classification Starts With Online Settings: Has online content Domains: Starts With Subject Areas: Starts With 12. Click Search. Search 13. On the Results screen, select the corresponding Classroom USDAaglearnTrn102 (Rev 9/15/2004 06:55 AM MST) Administrator Training (Introduction Add check box for each Item to be added to the Curriculum. 14. Click Add. Add 15. Review the added Items Classroom THG-MSEXCEL-101 (Rev 7/8/2005 11:06 AM MST) in the Update the Items Classroom TNG-MSEXCEL-102 (Rev 10/14/2005 Intermediate Excel Edit for the Curriculum section. Tip: To remove an Item from the curriculum, select the corresponding Remove check box. 16. Select the Edit link of the Edillim Classroom TNG-MSEXCEL-101 (Rev 7/8/2005 11:06 AM MST) Item to be edited.

Classroom TNG-MSEXCEL-102 (Rev 10/14/2005

01:21 PM MST)

Intermediate Excel

Edit

For example, if you want the learners to complete the item within 30 days, select Days from the Initial Period drop-down list and type 30 in the Initial Number text box.

For example, if you want learners to retrain on the item within 2 months, select Months from the Initial Period drop-down list and type 2 in the Initial Number text box.

Tell students that when they create an Item, the default date is the current date; but they may decide to set it to a future date since the curriculum status of any Learner who is assigned the curricula to which they are adding this new Item would become "incomplete" as soon as the Item is Added. By making the effective date a future date, they are defining a "grace period" to allow Learners to complete the new Item in the time allotted, without losing their curriculum.

Tell students that for online Items the system will not prevent a Learner from taking the Items out of the scheduled order (i.e., the Learner can take the Items in any order).

Edit a Curriculum Record **Activity** View Step 17. Enter the Initial Initial Assignments: Initial Number: Assignments data. Initial Period: Days (1000,0001) Note: The values in these Initial Basis: fields indicate how long, in days, weeks, etc., the Users has to complete this Item once it has been assigned. 18. Enter the Retraining Retraining Assignments: Retraining Number: Assignments data. Retraining Period: Days Retraining Basis: Note: The values in these Calendar 💿 Event fields indicate how frequently, in days, weeks, etc., the User must be retrained on this Item. 19. Click the Effective Date Effective Date: Calendar icon to select (MM/DD/YYYY) and enter an effective date. Note: The effective date is the date when a new or revised Item will be used for the calculation of Item completion statuses and curriculum statuses. 20. Click the Assignment Assignment Type: Type Selection icon to search for and enter an LEG_MAND (Legislatively Mandated) OPT (Optional) assignment type. REC (Recommended) REQ (Required) **21.** Enter a sequence number Sequence Number: (1000,001) in the Sequence Number field. Note: A sequence number indicates the order in which the Items in the curriculum will be scheduled by the

system. It is the order the User is expected to take the assigned Items in the

curriculum.

If a Subcurriculum is in

an incorrect domain, a

person with the right

domain.

permissions will need

to move it to the correct

check box.

Edit a Curriculum Record Step **Activity** View 22. Click Apply Changes. Apply Changes Caution: Do not select a different tab prior to clicking Apply Changes or all changes and modifications will be lost. 23. Select the Subcurricula Subcurricula Requirements Documents tab. 24. Select the Add one or add one or more from list more from list link to search for and enter Subcurricula into the Curriculum record. 25. On the > Search screen, Case sensitive search: Yes No enter the appropriate Curriculum ID: Starts With search criteria. Curriculum Title: Starts With 💌 Note: See Managing Data Entry and Searches for Curriculum Status: Active Not Active Both more detailed information on searching. 26. Click Search. Search 27. On the Results tab, Curriculum ID Add FS-Safety Safety and Health Awareness select the corresponding FSR1_SafetyQual Health and Safety Add check box for each Subcurriculum to be added to the Curriculum. 28. Click Add. Add **29.** Review the added Update the Subcurricula for the Curriculum Subcurricula in the **Update the Subcurricula** for the Curriculum section. Tip: To remove a Subcurriculum from the curriculum, select the corresponding Remove

Edit a Curriculum Record Step **Activity** View 30. Click Apply Changes. Apply Changes Caution: Do not select a different tab prior to clicking Apply Changes or all changes and modifications will be lost. 31. Select the Documents Job Positions Subcurricula **Documents** tab. 32. Select the Add one or add one or more from list more from list link to search for and enter Documents into the Curriculum record. 33. On the > Search screen, Case sensitive search: O Yes No enter the appropriate Document ID: Starts With search criteria. Note: See Managing Data Title: Starts With Entry and Searches for more detailed information on searching. 34. Click Search. Search 35. Select the corresponding TNG-ARSSEC- Security at ARS Facilities (PowerPoint Presentation) PPT Add check box for each Document to be added to the Curriculum. 36. Click Add. Add 37. Review the added Update the Subcurricula for the Curriculum Documents in the **Update** the Subcurricula for the Curriculum section. Tip: To remove a Document from the curriculum, select the corresponding Remove check box. 38. Click Apply Changes. Apply Changes Caution: Do not select a different tab prior to clicking Apply Changes or all changes and modifications will be lost.

If a Document is in an

someone with the right

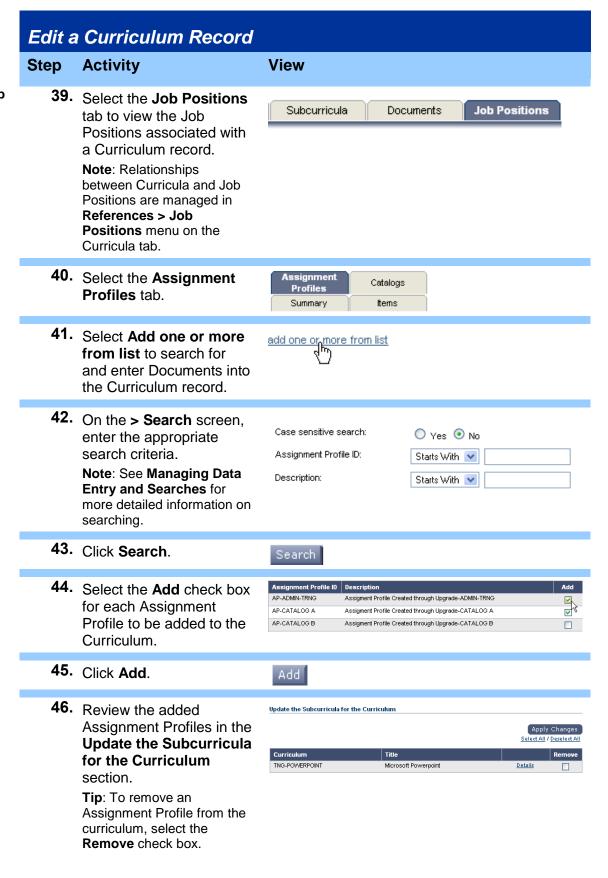
to move it to the correct

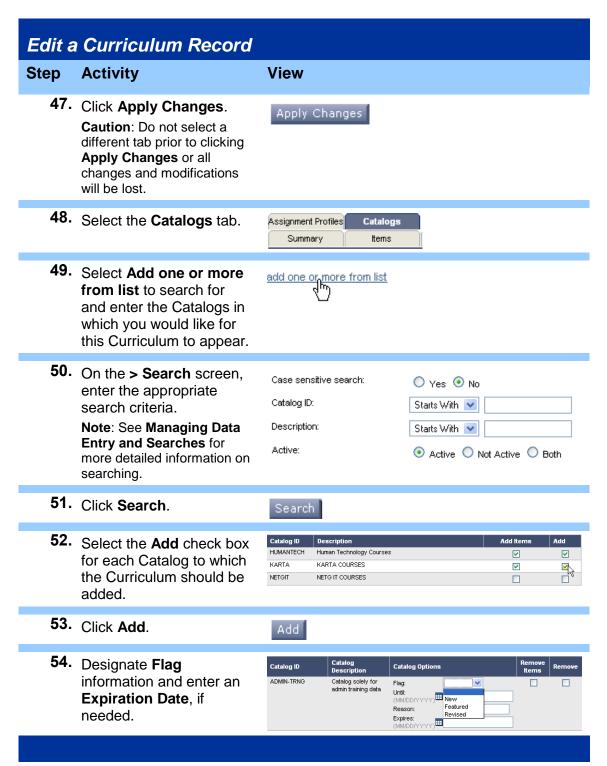
permissions will need

incorrect domain.

domain.

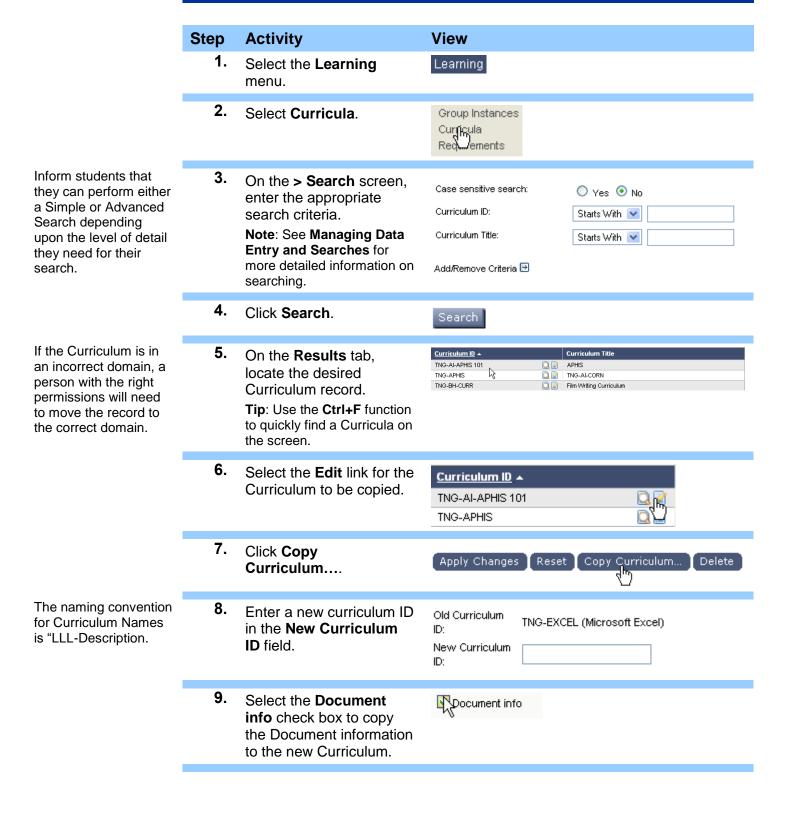
After selecting the Job Positions tab, the > Search > Search Results > View Job Positions screen appears.



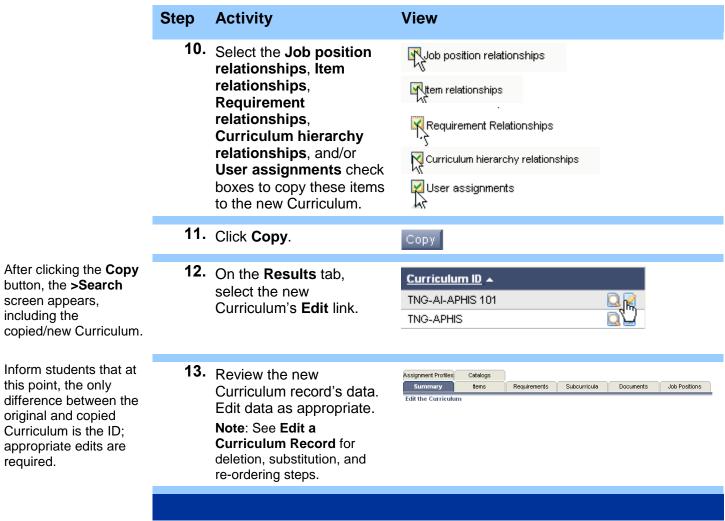


Tip: If a Curricula, Item or Document can not be located, search for the Curricula, Item or Document in other domains. During data entry, the Curricula, Item or Document may have been mistakenly placed in an incorrect domain.

Copy a Curriculum Record



Copy a Curriculum Record



Tip: If a Curriculum can not be located, search for the Curriculum in other domains. During data entry, the Curriculum may have been mistakenly placed in an incorrect domain.

Delete a Curriculum Record

Remind students that complete definitions of terms are included in the glossary.

Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

If the Curriculum is in an incorrect domain, a person with the right permissions will need to move the record to the correct domain. Step Activity View
1. Select the Learning Learning

menu.

2. Select Curricula.

3. On the > Search screen, enter the appropriate search criteria.

Note: See Managing Data Entry and Searches for more detailed information on searching.

Group Instances
Curricula
Red—ements

Case sensitive search:

Add/Remove Criteria 🗗

Curriculum ID:

Curriculum Title:

Search

TNG-AI-APHIS 101

TNG-APHIS

TNG-BH-CURF

Click Search.

On the Results tab, locate the desired Curriculum record.

Tip: Use the **Ctrl+F** function to quickly find a Curriculum on the screen.

Select the Edit link for the Curriculum to be deleted.

Curriculum ID ▲

TNG-AI-APHIS 101

TNG-APHIS

O Yes

No

Starts With

Starts With

TNG-AI-CORN

Film Writing Curriculum

7. Click Delete.

_

Delete

8. Click **OK** in the **Confirmation** box.



Tip: If a Curriculum can not be located, search for the Curriculum in other domains. During data entry, the Curriculum may have been mistakenly placed in an incorrect domain.

Managing Curriculum Assignments

A Curriculum is a grouping of learning Items. Subcurricula, Items, and Documents are grouped in a Curriculum to make them easier to assign, track, and maintain.

Curriculum assignments are managed by editing the Curricula tab of the User record. To assign curricula to multiple Users, see the **User Needs Management Assistant** (User Management menu).

Managing Curriculum Assignment tasks include: **Assign a Curriculum** and **Unassign a Curriculum to a User Record**.

A Day-in-the-Life Scenario

You are asked to:

- Add a Curriculum to a User's record, with a Required Completion date of 90 days from today
- Delete a Curriculum from a User's record

Notes

Assign a Curriculum to a User Record

Activity View Step Select the User User Management Management menu. 2. Select Users. Uşers A mgnment Profiles Job Positions On the > Search screen, enter the appropriate Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search search criteria. O Yes No Note: See Managing Data User ID: Starts With Entry and Searches for Last Name: Starts With more detailed information on Starts With searching. Middle Initial: Starts With Active Not Active Both Domains: Starts With **v**

Inform students that

Search depending

they need for their

search.

they can perform either

a Simple or Advanced

upon the level of detail

When creating a new

to add to Learners'
Learning Plans, create
some of the Scheduled
Offerings of the Items
with a self registration
option. Students will
then be able to login as
a Learner, view the
Curriculum, and
register for one of the

Curriculum for students

Items.

Assign a Curriculum to a User Record

To assign curricula to multiple learners, see the Learner Needs Management Assistant (Learner Management menu).

If the Learner is in an incorrect domain, a person with the right permissions will need to move the corresponding record to the correct domain.

After selecting the Edit link, the > Search > Search Results > Edit Summary screen appears.

Step **Activity** View 4. Click Search. Search 5. On the Results screen. User ID LEARNER04 Learner, Alec locate the desired User Q Learner, Bill LEARNER05 record. Tip: Use the Ctrl+F function to quickly find a User record on the screen. Records per Page 10 💌 Page: 123 «Previous | Next» (30 total records) Select the corresponding <u>User Name</u> ▲ User ID Edit link. Learner, Alec LEARNER04 LEARNER05 TRAINING LEARNER06 LEARNER06 Q 📝 Learner, Charlie TRAINING LEARNER12 7. Click the Curricula tab. Online Status Assessments Curricula Learning History Click Attach Job Related Attach Job Related Curricula Curricula to assign all the Curricula which are associated with the selected User's job position. Select the Add one or Add a Curriculum to the User more from list link to search for and enter a Enter 'Curriculum ID' and 'Assign Date' or add one or more from list curriculum ID and assign date.

Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

10. On the **> Search** screen, enter the appropriate search criteria.

Note: See Managing Data Entry and Searches for more detailed information on searching. Case sensitive search:

O Yes
No

Curriculum ID:

Starts With

Curriculum Title:

Starts With

Add/Remove Criteria

Add/Remove Criteria

Assign a Curriculum to a User Record

After clicking the Search button, the **Results** tab appears. If the Learner is in an incorrect domain, a person with the right permissions will need to move the corresponding record to the correct domain.

12. Select the desired curriculum's corresponding Add check box.



13. Click Add.

Step

Activity

11. Click Search.

Add

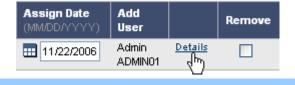
View

Search

14. Scroll down to the Update the Curricula for the User section to view the newly assigned curriculum.



15. Click the **Details** link to view the Items for the Curriculum.



16. Click **Close** to close the Curricula Items window.

Close

17. Click the Learning Plan tab to enter the required dates for the curricula and subcurricula.



18. Scroll down to the Update the Learning Plan for the User section.

Update the Learning Plan for the User

19. Click the Req. Date
Calendar icon to select
and enter the date by
which that User must
complete the Item.
Repeat for all Items listed.



If the Curriculum has associated subcurricula, a Plus sign (+) will precede the name of the Curriculum.

Some roles allow changing the Assign Date after it is added to the Learner record, in the Update the Curricula for the Learner section.

Curricula Items can be modified by clicking the **Learning Plan** tab.

Assign a Curriculum to a User Record

Step Activity View 20. Click Apply Changes. Caution: Do not click a different tab prior to clicking Apply Changes or all changes and modifications will be lost. Apply Changes

Caution: Do not use your browser's **Back** button when using AgLearn – use the menus, links, and breadcrumbs in AgLearn to navigate.

Tip: If a User or Curriculum record can not be located, search for the User or Curriculum record in other domains. During data entry, the User or Curriculum may have been mistakenly placed in an incorrect domain.

Remove a Curriculum from a User Record

Remind students that complete definitions of terms are included in the glossary.

Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

If the Learner is in an incorrect domain, a person with the right permissions will need to move the corresponding record to the correct domain.

After selecting the Edit link, the Learner record Summary tab appears.

If students had an opportunity to view the assignment via the Learner interface, have Step **Activity View**

1. Select the User Management menu.

2. Select Users.

A(h)gnment Profiles Job Positions

User Management

On the > Search screen, enter the appropriate search criteria.

> Note: See Managing Data Entry and Searches for more detailed information on searching.

Case sensitive search: O Yes

No User ID: Starts With Last Name Starts With

> Starts With Starts With

Starts With

Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search.

4. Click Search.

Search

First Name:

Middle Initial

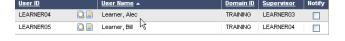
User Status:

Domains:

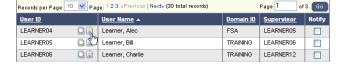
Search Users

On the > Search Results screen. locate the desired User record.

> Tip: Use the Ctrl+F function to quickly find a User record on the screen.



Select the corresponding Edit link.



7. Click the Curricula tab.



Update the Curricula for the User

Scroll down to the Update the Curricula for the User section of the screen.

Curriculum ID 11/22/2006 Curriculum ID Title TNG-ALAPHIS Admin ADMIN01 11/22/2006

9. Select the corresponding Remove check box of the Curriculum to be unassigned.

Remove a Curriculum from a User Record

| | Step | Activity | View |
|--|------|--|---------------|
| them return to the Learner interface once the Curriculum has been unassigned to view the difference. | 10. | Click Apply Changes. Caution: Do not click a different tab prior to clicking Apply Changes or all changes and modifications will be lost. | Apply Changes |

Caution: Do not use your browser's **Back** button when using AgLearn – use the menus, links, and breadcrumbs in AgLearn to navigate.

Tip: If a User or Curriculum record can not be located, search for the User or Curriculum record in other domains. During data entry, the User or Curriculum may have been mistakenly placed in an incorrect domain.

Managing Classes

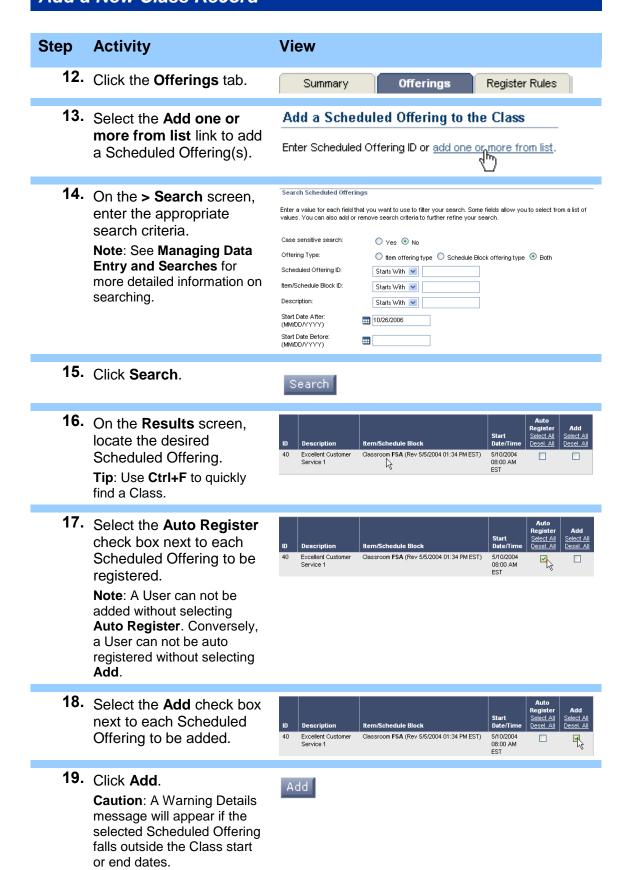
A Class is a group of Users who are assigned the same items and attend and complete the same set of Scheduled Offerings as a group. Each Class has a specific start and end date. Subtasks pertaining to **Managing Classes** are accessible from the **Scheduling** menu. Class specific subtasks include the following: **View**, **Add**, **Edit**, and **Delete a Class Record**. Several reasons for editing a Class record include the following: adding/deleting Users, auto registering Users, and adding a Scheduled Offering.

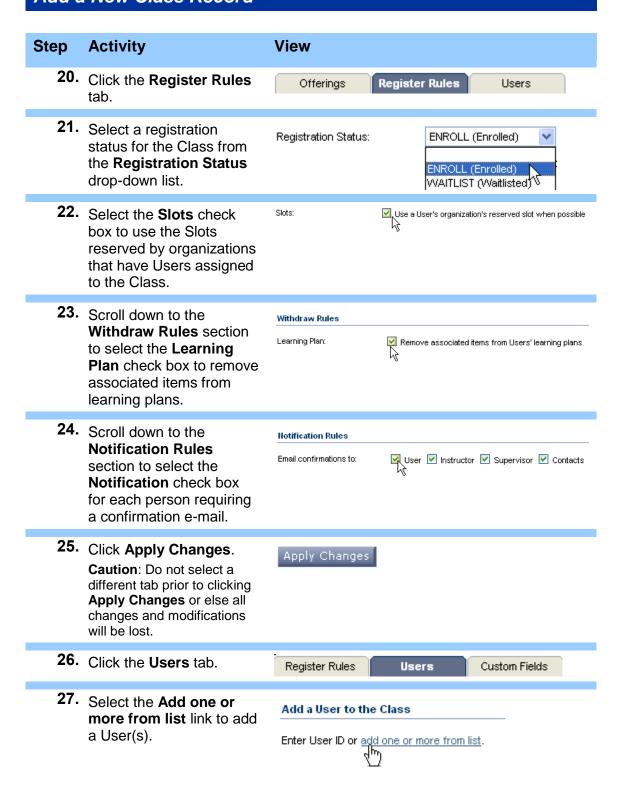
A Day-in-the-Life Scenario

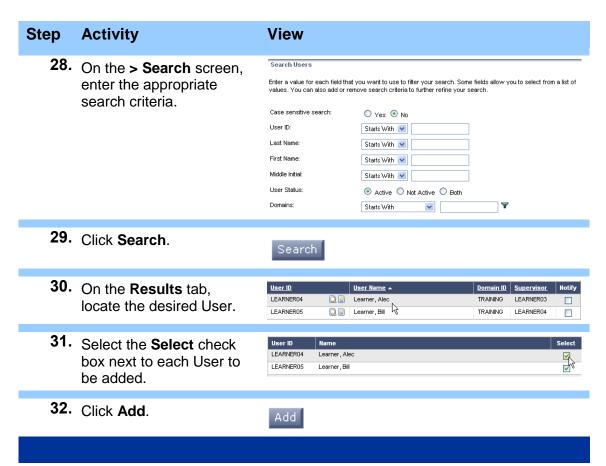
You have received notification that a group of 5 new employees are starting their jobs next week. They have already been added to AgLearn; it is now your responsibility to assign them to the standard Items that all new hires must complete within their first 3 months on the job.

View a Class Record Step **Activity View** 1. Select the **Learning** Learning menu. 2. Select Classes. Scheduled Offerings Classes Grand Instances Saved Searches 🖳 3. On the > Search screen, Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of enter the appropriate search criteria. Yes No **Note:** See Managing Data Starts With Entry and Searches for Description: Starts With more detailed information on searching. 4. Click Search. Search 5. On the **Results** screen, December Test Class locate the desired Class. FS New Hires Initial training courses Tip: Use Ctrl+F to quickly find a Class. Click the corresponding Class ID 🔺 View link to view the December Test Class Class. FS New Hires

| Step | Activity | View |
|------|---|---|
| 1. | Select the Learning menu. | Learning |
| 2. | Select Classes. | Scheduled Offerings Classes Grann Instances |
| 3. | Select the Add New link. | Search Ad r. New Help |
| 4. | Enter a Class ID in the Class ID field. | * Class ID: |
| 5. | Enter a Class description in the Description field. | Description: |
| 6. | Click the Domain selection icon to search for and enter a Domain. | * Domain: PUBLIC |
| 7. | Click the Curriculum selection icon to search for and enter a curriculum (if applicable). Note : If a User is removed from the Class, the curriculum is unassigned. | Curriculum: |
| 8. | Enter the maximum number of Users allowed in the Class in the Max Size field. | Max Size: (1000,001) |
| 9. | Click the Start Date calendar icon to select and enter a start date. | Start Date: (MM/DD/YYYY) |
| 10. | Click the End Date calendar icon to select and enter an end date. | End Date: (MM/DD/YYYY) |
| 11. | Click Add . Caution : A Validation Error message will appear if all required fields are not complete. | Add |





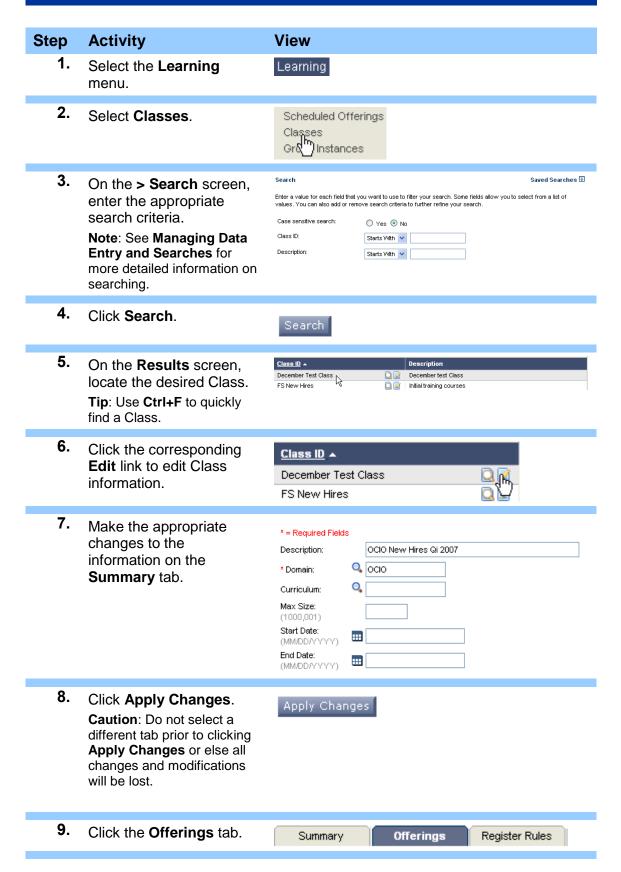


Tip: Use the Calendar and Selection icon assistants to avoid data formatting errors.

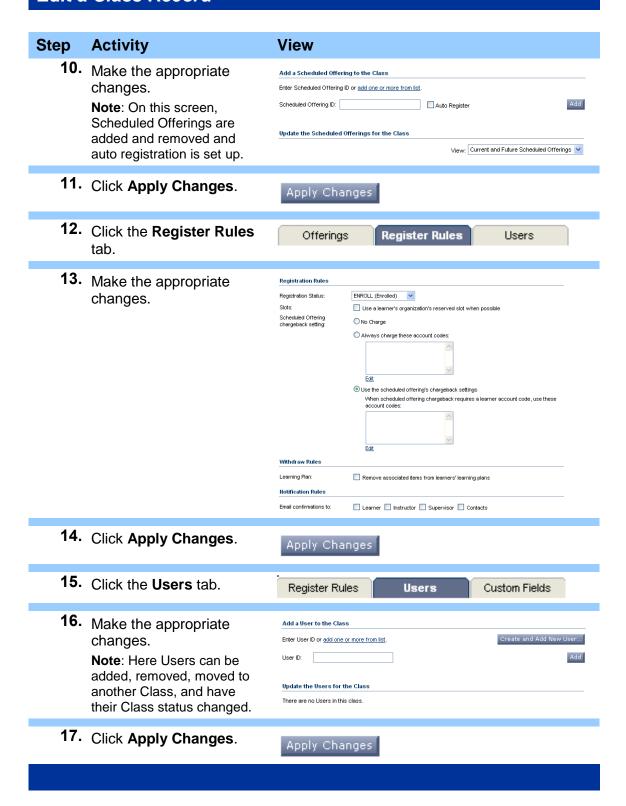
Tip: If a Scheduled Offering or User can not be located, search for them in other domains. During data entry, the Scheduled Offering or User may have been mistakenly placed in an incorrect domain.

Note: See **Managing Data Entry and Searches** for more detailed information pertaining to the **Selection** and **Calendar** icons.

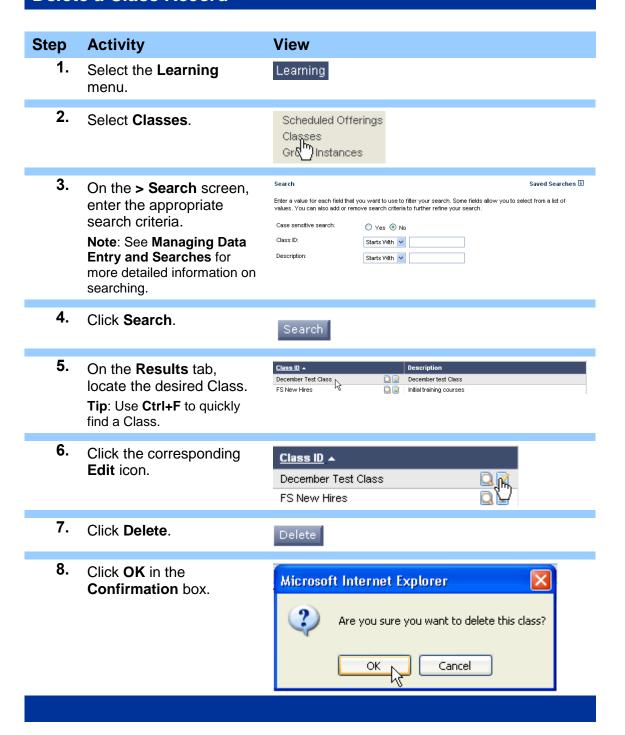
Edit a Class Record



Edit a Class Record



Delete a Class Record



After introducing the task via the Overview, highlight the roles assigned to perform each subtask

User Needs Management

The User Needs Management (UNM) Assistant provides onscreen instructions for each step of the process of adding to, or removing elements from, a User record or group of User records.

The User Needs Management Assistant is available from the **User Management** menu.

User Needs Management Assistant tasks include Add Curricula, Add Items, Add Competency Profiles, Add Competencies, Add Job-related Curricula, Add Job-related Competency Profiles, Remove Curricula, Remove Items, Remove Competency Profiles, and Remove Competencies to/from User record(s) with the UNM (User Needs Management) Assistant.

A Day-in-the-Life Scenario:

It has been decided to assign First Aid and CPR training Items to several AgLearn Security Guards involved in a special AgLearn-hosted event.

Notes

Add Curricula to User Record(s) with the UNM Assistant

| | Step | Activity | View |
|---|------|---|--|
| | 1. | Select the User Management menu. | User Management |
| | 2. | Select Tools from the left menu. | Regions + Took + Refunces |
| | 3. | Select User Needs Mgmt . | -Supervisor Assistant - <u>User Neads Mamt</u> + Reference |
| Remind students that required fields are identified by a red asterisk. Although remaining fields are not required, students should complete as many as they feel necessary. | 4. | Click the Add Curricula option button. | Step 1: Select Management Action Add Curricula Add Items |
| | 5. | Click Next to move to Step 2. | Next |
| After clicking Next , the Step 2: Select Learners screen appears. | 6. | Select the Add one or more from list link to search for and enter Users into the UNM Assistant. | Add Users Enter User ID or add one or more from list. * User ID: |
| | | | |

Add Curricula to User Record(s) with the UNM Assistant

Step **Activity** View After selecting the add 7. On the > Search screen. one or more from list Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search. enter the appropriate link. the > Search search criteria. screen appears. O Yes

No Note: See Managing Data User ID: Starts With Entry and Searches for Last Name: Starts With more detailed information on First Name Starts With searching. Middle Initial: Starts With User Status: Active Not Active Both Starts With 8. Click Search. Search After clicking Search, 9. On the **Results** tab, the Results tab select the corresponding Learner, Bill appears. Add check box for each LEARNER06 Learner, Charlie LEARNER02 Learner, Dashiell User to be added. 10. Click Add. Add After clicking Add, the 11. Review the Users in the Edit Users Step 2: Select Edit Users section. Apply Changes Learners screen Select All / Deselect All Tip: To remove a User, appears. select the corresponding Remove check box and LEARNER05 Learner, Bill LEARNER06 click Apply Changes. Learner, Charlie **12.** Click **Next** to move to Next Step 3. After clicking Next, the 13. Select the Add one or Step 3: Adding Select Curricula for Adding more from list link to Curricula screen search for and enter Enter Curriculum ID or add one or more from list appears. Curricula into the UNM * Curriculum ID: Assistant. After selecting the add **14.** On the > Search screen, Case sensitive search: one or more from list Yes
No enter the appropriate link, the > Search Curriculum ID: Starts With search criteria. screen appears. **Note:** See Managing Data Curriculum Title: Starts With Entry and Searches for more detailed information on Add/Remove Criteria 🗗 searching. 15. Click Search. Search

Add Curricula to User Record(s) with the UNM Assistant

Step **Activity** View After clicking Search, 16. On the Results tab, the Results tab select the corresponding AC-TEST CURRICULA appears. Add check box for each ADMIN-BUDGET Budget skills curriculum to be added. 17. Click Add. Add After clicking Add, the 18. Review the curricula in Edit the List of Curricula for Adding Step 3: Adding the Edit the List of Curricula screen **Curricula for Adding** Select All / Deselect All appears. section. AC-TEST CURRICULA Tip: To remove curricula, AM-RD-Communicating select the corresponding Remove check box and click Apply Changes. After clicking Next, the 19. Click Next to move to Next Step 4: Edit Assign Step 4. Dates screen appears. Tell students that 20. For each curriculum Curriculum ID Title assign dates can be set listed, click the AC-TEST CURRICULA Demo Curricula 11/22/2006 in the past, but not in corresponding Assign AM-RD-Communicating Communication training for new RD Specialist the future. **Date** Calendar icon to select and enter an assign date for that curriculum. Note: The current date is the default date. After clicking Next, the 21. Click Next to move to Next Step 5: Complete Step 5. **Learner Needs** Management screen appears. Tell students that jobs 22. Click Run Job Now to Run Job Now that will add multiple have AgLearn complete curricula to many the assignment to User Learners can place a record(s). strain on system Note: See Scheduling resources. Schedule Background Jobs for more large jobs for times detailed information on when most users are scheduling jobs. off the system.

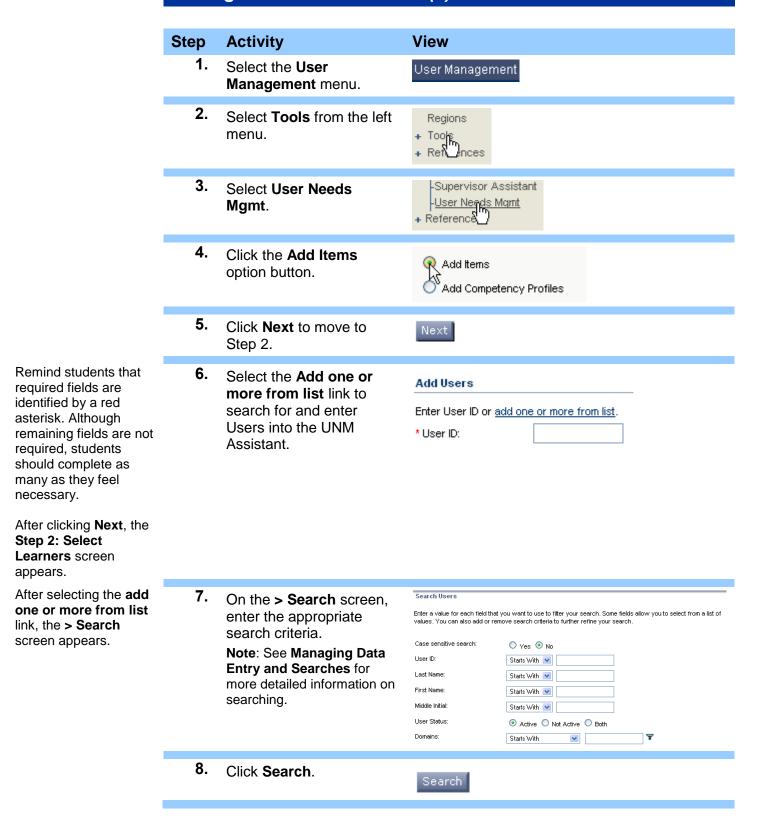
Add Curricula to User Record(s) with the UNM Assistant

| Step | Activity | View |
|------|--|---|
| 23. | Review the Status message(s) on the Finished screen. | Finished Status: |
| | | Successfully added the curricula to the specified learners. |

Caution: Do not use the browser's **Back** button when using the User Needs Management Assistant. Use the **Previous** button to move back to previous step(s).

Tip: If a record can not be located, search for the record in other domains. During data entry, the record may have been mistakenly placed in an incorrect domain.

Adding Items to User Record(s) with the UNM Assistant



Adding Items to User Record(s) with the UNM Assistant

Step **Activity** View After clicking Search, 9. On the **Results** tab, the Results tab select the corresponding LEARNER05 Learner, Bill appears. Add check box for each LEARNER06 Learner, Charlie V LEARNER02 User to be added. Learner, Dashiell 10. Click Add. Add After clicking Add, the 11. Review the Users in the Edit Users Step 2: Select Edit Users section. Apply Changes Learners screen Select All / Deselect All **Tip**: To remove a User, appears. select the corresponding Remove check box and LEARNER05 Learner, Bill LEARNER06 Learner, Charlie click Apply Changes. 12. Click Next to move to Next Step 3. After clicking Next, the 13. Select the Add one or Select Items for Adding Step 3: Adding Items more from list link to screen appears. search for and enter Enter 'Item ID' and 'Item Type' or add one or more from list. Items into the UNM * Type: Assistant. After selecting the add **14.** On the > **Search** screen, Case sensitive search: O Yes

No one or more from list enter the appropriate Item Types: link, the > Search Starts With search criteria. screen appears. item ID: Starts With 💌 Note: See Managing Data Revision Date: Entry and Searches for (MM/DD/YYYY) more detailed information on Revision Number: Starts With searching. Item Title: Starts With Item Status: Active O Not Active O Both Item Classification Starts With Online Settings: Has online content Domains: Starts With Subject Areas: Starts With 15. Click Search. Search After clicking Search, 16. On the Results tab select Classroom TNG-MSEXCEL-101 (Rev 7/8/2005 01:06 PM EST) the Results tab the corresponding Add appears. check box for each Item Classroom THG-MSEXCEL-102 (Rev 10/14/2005 03:21 PM EST) Intermediate Exce to be added.

Adding Items to User Record(s) with the UNM Assistant

Step **Activity** View 17. Click Add. Add 18. Review the Items in the Edit the List of Items for Adding Apply Changes Edit the List of Items for Select All / Deselect All Adding section. Classroom TNC MSEXCEL-101 (Rev 7/8/2005 01:06 PM EST) Tip: To remove Items, select the corresponding Remove Classroom TNG-MSEXCEL-102 (Rev 10/14/2005 03:21 PM EST) check box and click Apply Intermediate Excel 11/22/2006 Changes. 19. Click Next to move to Next Step 4. **20.** For each Item listed, click Assign. Type Title the corresponding Assign Classroom TNG-Basic Excel MSEXCEL -101 Type to select an (Rev 7/8/2005 LEG_MAND (Legislatively Mandated) 01:06 PM EST) assignment type for that OPT (Optional) REC (Recommended) Item. REQ (Required) 21. Click Next to move to Next Step 5. 22. For each Item listed, click Title Assign Date the corresponding Classroom TNG-MSEXCEL-101 11/22/2006 Basic Excel 11/29/2006 (Rev 7/8/2005 01:06 PM EST) Required Date Calendar Classroom TNG-MSEXCEL-102 (Rev 10/14/2005 03:21 PM EST) icon to select and enter Intermediate Excel 11/22/2006 11/22/2006 the date by which the User must complete that Item. 23. Click Run Job Now to Run Job Now have AgLearn complete the assignment to User record(s). Note: See Scheduling Background Jobs for more detailed information on scheduling jobs.

After clicking Next, the Step 4: Edit Item Information screen

appears.

After clicking Add, the

Step 3: Adding Items

screen appears.

24. Review the Status message(s) on the Finished screen.



After clicking Next, the Step 5: Complete Learner Needs Management screen appears.

Inform students that jobs that will add multiple items to many Learners can place a strain on system resources. Schedule large jobs for times when most users are off the system.

After clicking Run Job Now (or Schedule Job, scheduling the job and clicking Finish) the Finished > Status screen appears. **Caution**: Do not use the browser's **Back** button when using the UNM Assistant. Use the **Previous** button to move back to previous step(s).

Tip: If a record cannot be located, search for the record in other domains. During data entry, the record may have been mistakenly placed in an incorrect domain.

Editing a "Required By" date by Using the Required Date Editor

| Step | Activity | View |
|------|--|--|
| 1. | Select the Learning menu. | Learning |
| 2. | Select Tools . | Regions + Tools + Refunces |
| 3. | Select Required Dates Editor . | Inventory Adjustment -Required Dates Editor -Schelled Offering Notification |
| 4. | Select the Add one or more from list link to search for and enter Users into the Required Date Editor. | Add Users Enter User ID or add one or more from list. * User ID: |
| 5. | When the list is complete, click Next . | Next |
| 6. | Select the Add one or more from list link to search for and enter Curricula into the Required Date Editor. Note: For more information on searches, see Managing Data Entry and Searches earlier in this manual. | Add Curricula Enter Curriculum ID or add one or more from list. * Curriculum ID: |
| 7. | When the list is complete, click Next . | Next |
| 8. | Select the Add one or more from list link to search for and enter Items into the Required Date Editor. Note: For more information on searches, see Managing Data Entry and Searches earlier in this manual. | Add Items Enter Items or and one or more from list. *Item Type: |
| 9. | When the list is complete, click Next . | Next |

Editing a "Required By" date by Using the Required Date Editor



After clicking Next, the

Remind students that

remaining fields are not

After selecting the add

one or more from list

link, the > Search

screen appears.

required fields are

identified by a red

asterisk. Although

required, students should complete as many as they feel necessary.

Step 2: Select

appears.

Learners screen

Add Competency Profiles to User Record(s) with the UNM Assistant

Step **Activity** View 1. Select the User User Management Management menu. 2. Select Tools from the left Regions + Tools menu. + Renoces 3. -Supervisor Assistant Select User Needs -<u>User Needs Mamt</u> + Reference Mgmt. 4. Click the Add Add Competency Profiles **Competency Profiles** Add Competencies option button. 5. Click Next to move to Next Step 2. 6. Select the Add one or Add Users more from list link to search for and enter Enter User ID or add one or more from list. Users into the UNM * User ID: Assistant. Search Users On the > Search screen, Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values, You can also add or remove search criteria to further refine your search. enter the appropriate search criteria. Case sensitive search: O Yes No Note: See Managing Data User ID: Starts With Entry and Searches for Starts With more detailed information on First Name: Starts With searching. Middle Initial: Starts With User Status: Active Not Active Both Domains: Starts With 8. Click Search. Search 9. On the **Results** screen select the corresponding LEARNEROS Add check box for each

LEARNER06

LEARNER02

User to be added.

Learner, Charlie

Learner, Dashiel

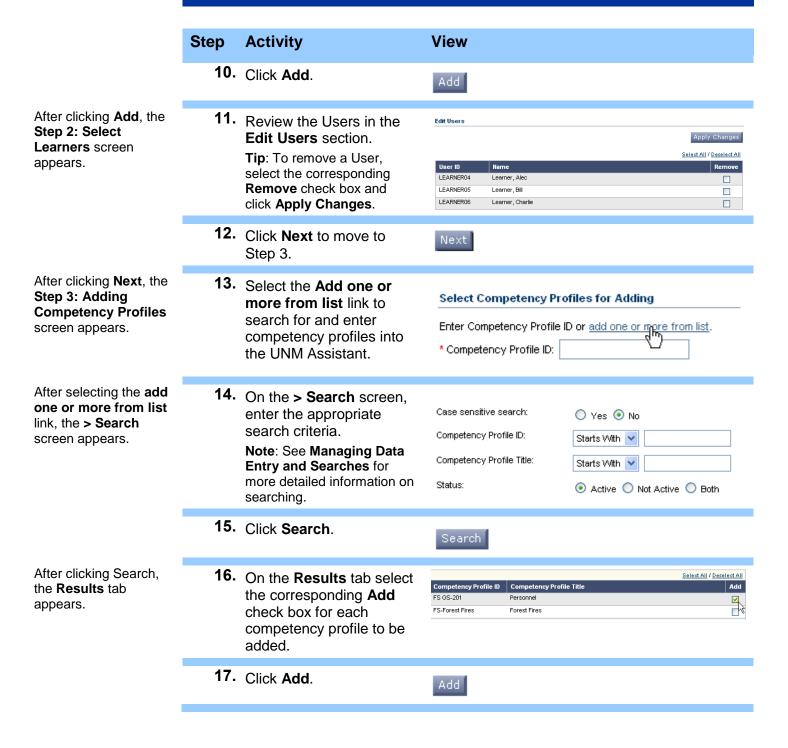
the Results tab

appears.

186

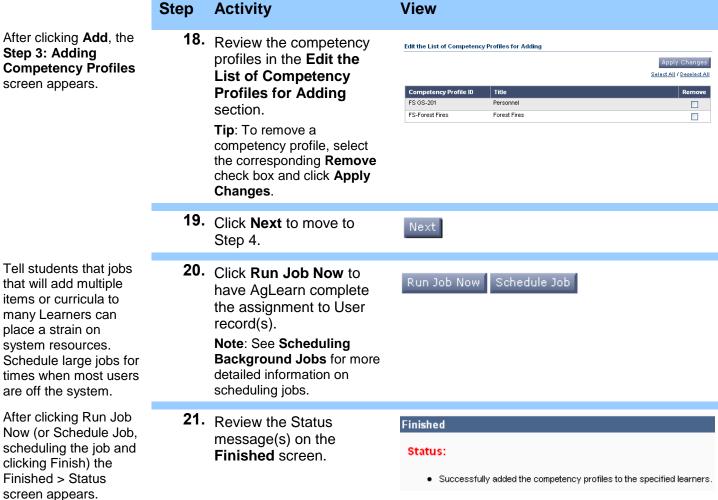
After clicking Search,

Add Competency Profiles to User Record(s) with the UNM Assistant



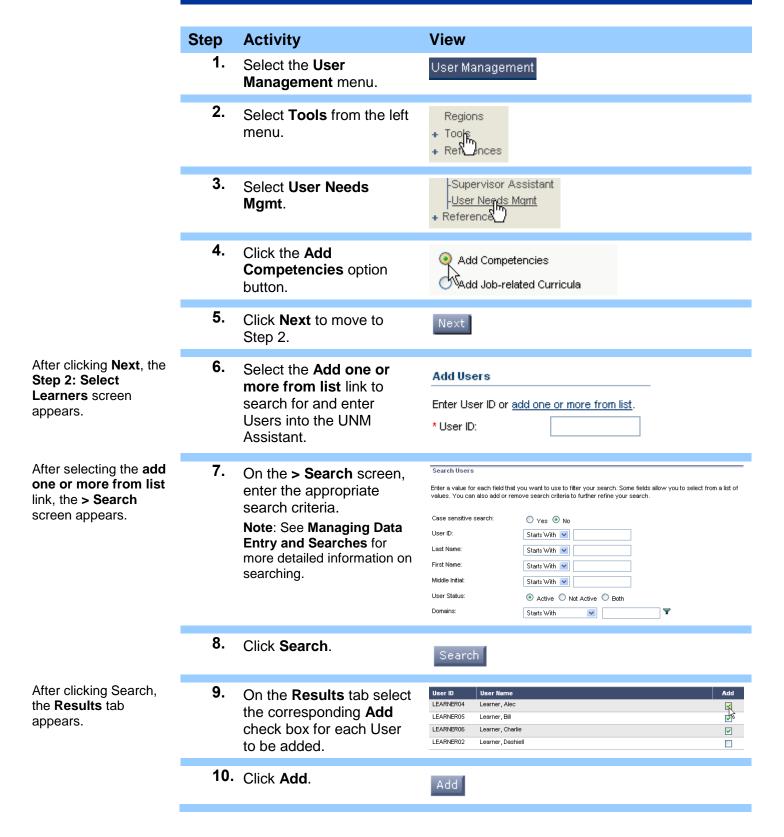
Add Competency Profiles to User Record(s) with the UNM Assistant

After clicking Add, the Step 3: Adding **Competency Profiles** screen appears.



Caution: Do not use the browser's Back button when using the UNM Assistant. Use the Previous button to move back to previous step(s).

Add Competencies to User Record(s) with the UNM Assistant



Add Competencies to User Record(s) with the UNM Assistant

View

Edit Users

After clicking **Add**, the **Step 2: Select Learners** screen appears.

11. Review the Users in the Edit Users section.

Activity

Step

Tip: To remove a User, select the corresponding **Remove** check box and click **Apply Changes**.

12. Click **Next** to move to Step 3.

Next

After clicking **Next**, the **Step 3: Adding Competencies** screen appears.

 Select the Add one or more from list link to search for and enter competencies into the UNM Assistant.

Select Competencies for Adding

* Competency ID:

After selecting the **add one or more from list** link, the **> Search** screen appears.

14. On the **> Search** screen, enter the appropriate search criteria.

Note: See Managing Data Entry and Searches for more detailed information on searching. Case sensitive search:

O Yes 💿 No

Competency ID:

Description:

Competency Status:

Starts With V

Active
 Not Active
 Both

Apply Changes

15. Click Search.

Search

After clicking Search, the **Results** tab appears.

16. On the Results tab select the corresponding Add check box for each competency to be added.



17. Click Add.

Add

After clicking **Add**, the **Step 3: Adding Competencies** screen appears.

18. Review the competencies in the Edit the List of Competencies for Adding section.

Tip: To remove a competency, select the corresponding **Remove** check box and click **Apply Changes**.

Edit the List of Competencies for Adding

After clicking **Next**, the **Step 4: Enter**

19. Click **Next** to move to Step 4.

Next

Add Competencies to User Record(s) with the UNM Assistant

Minimum Ratings screen appears.

Discuss Required Level/mastery level by using an example like Public Speaking different levels of mastery are required for Programmers than **Public Information** Officers.

Tell students that jobs that will add multiple items to many Learners can place a strain on system resources. Schedule large jobs for times when most users are off the system.

After clicking Run Job Now (or Schedule Job, scheduling the job and clicking Finish) the Finished > Status screen appears.

previous step(s).

20. For each competency, select the required mastery level for that User or group of Users. Repeat for each Competency from the Minimum Rating dropdown list.

Activity

Step

21. Click Next to move to Step 5.

22. Click Run Job Now to have AgLearn complete the assignment to User

> Note: See Scheduling Background Jobs for more detailed information on scheduling jobs.

23. Review the Status message(s) on the Finished screen.

record(s).

View



Next

Finished

Status:

Run Job Now

Caution: Do not use the browser's Back button when using the UNM Assistant. Use the Previous button to move back to

Successfully added the competencies to the specified learners.

Tip: If a record can not be located, search for the record in other domains. During data entry, the record may have been mistakenly placed in an incorrect domain.

Remind students that

remaining fields are not

After clicking Next, the

After selecting the add

one or more from list

link, the > Search

screen appears.

Step 2: Select Learners screen

appears.

required fields are

identified by a red

asterisk. Although

required, students should complete as many as they feel necessary.

Add Job-related Curricula to User Record(s) with the UNM Assistant

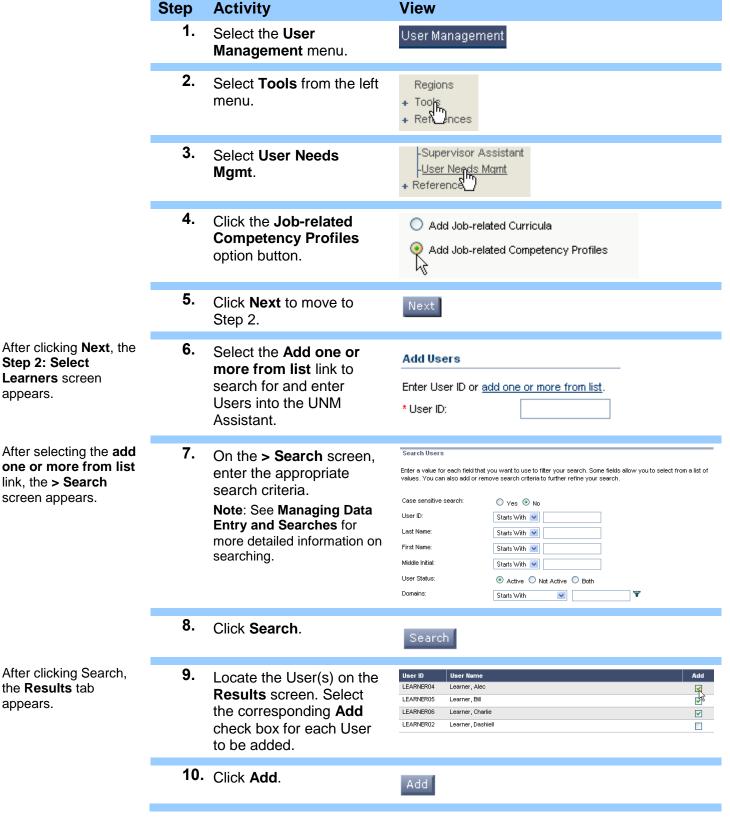
Step **Activity** View 1. Select the User User Management Management menu. 2. Select Tools from the left Regions + Took menu. + Refulences 3. -Supervisor Assistant Select User Needs -<u>User Needs Mamt</u> + Reference Mgmt. Select the Add Job-Add Job-related Curricula related Curricula option Add Job-related Competency Profiles button. 5. Click Next to move to Next Step 2. 6. Select the Add one or Add Users more from list link to search for and enter Enter User ID or add one or more from list. Users into the UNM * User ID: Assistant. Search Users 7. On the > Search screen, Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search. enter the appropriate search criteria. Case sensitive search: O Yes No Note: See Managing Data User ID: Starts With Entry and Searches for Starts With more detailed information on First Name: Starts With searching. Starts With User Status: Domains: Starts With 8. Click Search. Search

Add Job-related Curricula to User Record(s) with the UNM Assistant

Step **Activity** View After clicking Search, 9. On the Results screen the Results tab select the corresponding LEARNER05 appears. Add check box for each LEARNER06 Learner, Charlie \checkmark LEARNER02 Learner, Dashiel User to be added. 10. Click Add. Add After clicking Add, the 11. Review the Users in the Edit Users Step 2: Select Edit Users section. Learners screen Select All / Deselect All Tip: To remove a User, appears. select the corresponding Remove check box and LEARNER05 Learner, Bill click Apply Changes. LEARNER06 Learner, Charlie 12. Click Next to move to Step 3. Tell students that jobs 13. Click Run Job Now to Run Job Now that will add multiple have AgLearn complete items to many Learners the assignment of jobcan place a strain on related curricula to the system resources. listed User record(s). Schedule large jobs for times when most users Note: See Scheduling are off the system. Background Jobs for more detailed information on After clicking Run Job scheduling jobs. Now (or Schedule Job. 14. Review the Status scheduling the job and Finished clicking Finish) the message on the Finished Finished > Status Status: screen. screen appears. Successfully added the job related curricula to the specified learners.

Caution: Do not use the browser's **Back** button when using the UNM Assistant. Use the **Previous** button to move back to previous step(s).

Add Job-related Competency Profiles to User Record(s) with the UNM Assistant



Add Job-related Competency Profiles to User Record(s) with the UNM Assistant

After clicking Add, the Step 2: Select Learners screen appears.

Tell students that jobs that will add multiple items to many Learners can place a strain on system resources. Schedule large jobs for times when most users are off the system.

After clicking Run Job Now (or Schedule Job, scheduling the job and clicking Finish) the Finished > Status screen appears. Step **Activity View** 11. Review the Users in the Edit Users Edit Users section. Apply Changes Select All / Deselect All Tip: To remove a User, select the corresponding Learner, Alec Remove check box and LEARNER05 Learner, Bill LEARNER06 click Apply Changes. Learner, Charlie 12. Click Next to move to Next Step 3. 13. Click Run Job Now to Run Job Now have AgLearn complete the assignment of jobrelated curricula to the listed User record(s). Note: See Scheduling Background Jobs for more detailed information on scheduling jobs. 14. Review the Status Finished message on the Finished Status: screen.

· Successfully added the job related competency profiles to the specified learners.

Caution: Do not use the browser's **Back** button when using the UNM Assistant. Use the **Previous** button to move back to previous step(s).

required fields are

identified by a red

asterisk. Although

required, students should complete as many as they feel necessary.

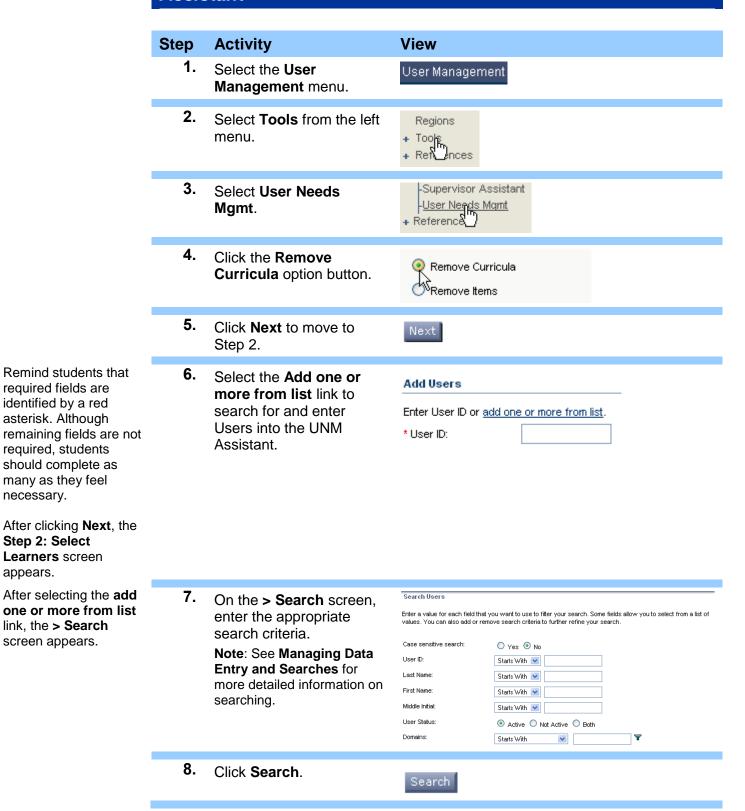
Step 2: Select Learners screen

link, the > Search

screen appears.

appears.

Remove Curricula from User Record(s) with the UNM Assistant



Remove Curricula from User Record(s) with the UNM Assistant

Step **Activity View** After clicking Search, 9. Locate the User(s) on the the Results tab Results tab. Select the LEARNER05 appears. corresponding Add check LEARNER06 Learner, Charlie V LEARNER02 Learner, Dashiell box for each User to be added. 10. Click Add. Add After clicking Add, the 11. Review the Users in the Edit Users Step 2: Select Edit Users section. Learners screen Select All / Deselect All Tip: To remove a User, appears. select the corresponding Remove check box and LEARNER05 Learner, Bill LEARNER06 click Apply Changes. Learner, Charlie 12. Click Next to move to Next Step 3. After clicking Next, the 13. Select the Add one or Step 3: Removing more from list link to Select Curricula for Removal Curricula screen search for and enter appears. Enter Curriculum ID or adji one or more from list. curricula into the list of * Curriculum ID: curricula for removal. After selecting the add **14.** On the > **Search** screen, one or more from list Case sensitive search: O Yes

No enter the appropriate link. the > Search Curriculum ID: search criteria. Starts With screen appears. Note: See Managing Data Curriculum Title: Starts With 💌 Entry and Searches for more detailed information on Add/Remove Criteria 🗗 searching. 15. Click Search. Search After clicking Search, 16. On the Results tab, Curriculum ID the Results tab select the corresponding AC-TEST CURRICULA Demo Curricula appears. Add check box for each ADMIN-BUDGET Budget skills curriculum to be added to Clarify that students the list of curricula for are building a list of removal. curriculum to be removed.

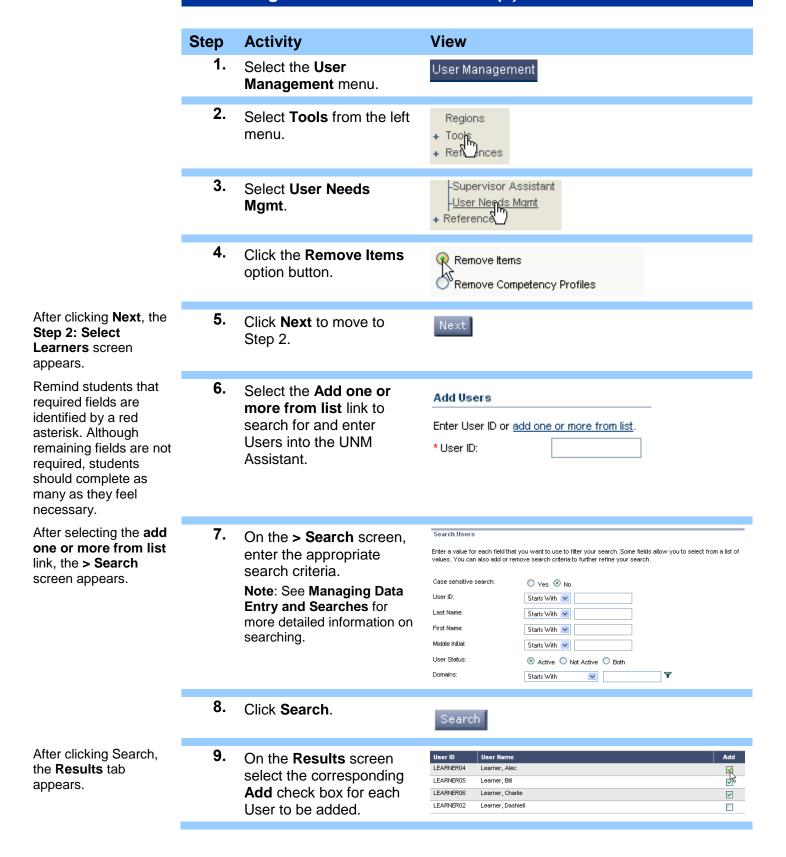
Remove Curricula from User Record(s) with the UNM Assistant

Step **Activity** View After clicking Add, the 17. Click Add. Add Step 3: Removing Curricula screen appears. Clarify that if a 18. Review the curricula in Edit the List of Curricula for Removal curriculum was the Edit the List of Apply Changes mistakenly added to **Curricula for Removal** Select All / Deselect All the Removal list, this section. action provides a Tip: To remove a Curriculum means to correct the from the List of Curricula error. for Removal, select the corresponding Remove check box. Inform students that 19. Click Run Job Now to Run Job Now iobs that will remove have AgLearn complete multiple items from the un-assignment to many Learners can User record(s). place a strain on Note: See Scheduling system resources. Background Jobs for more Schedule large jobs for detailed information on times when most users scheduling jobs. are off the system. After clicking Run Job 20. Review the Status Finished Now (or Schedule Job, message on the Finished scheduling the job and screen. Status: clicking Finish) the Finished > Status · Successfully removed the curricula from the specified learners. screen appears.

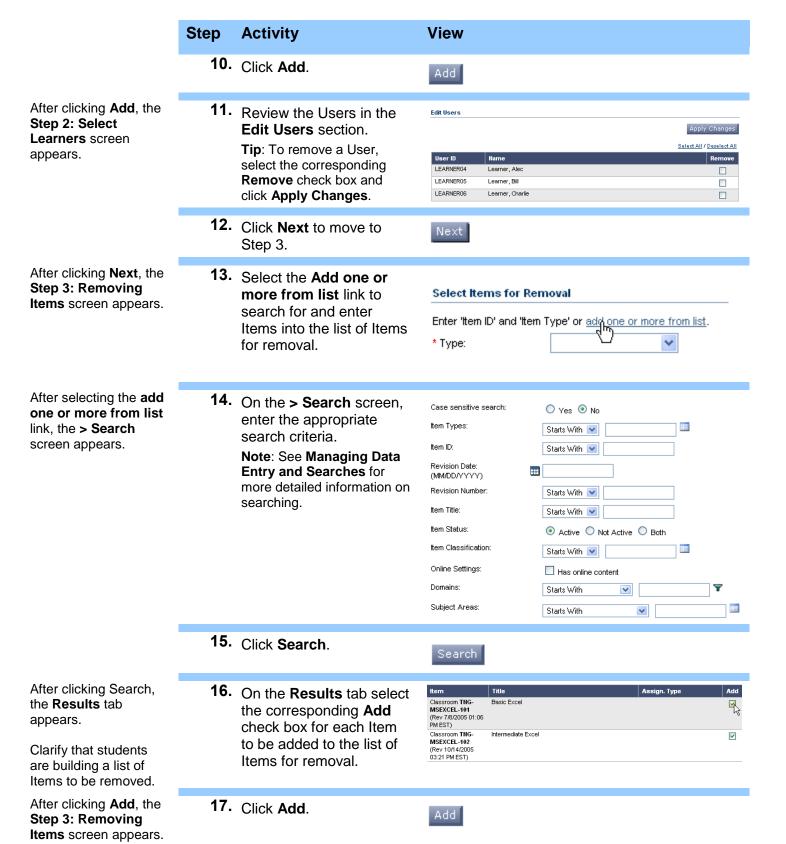
Caution: Do not use the browser's **Back** button when using the UNM Assistant. Use the **Previous** button to move back to previous step(s).

Tip: If a record can not be located, search for the record in other domains. During data entry, the record may have been mistakenly placed in an incorrect domain.

Removing Items from User Record(s) with the UNM Assistant



Removing Items from User Record(s) with the UNM Assistant



Removing Items from User Record(s) with the UNM Assistant

View

Clarify that if an Item was mistakenly added to the Removal list, this action provides a means to correct the error.

Jobs that will remove multiple items from many Learners can place a strain on system resources. Schedule large jobs for times when most users are off the system.

After clicking Run Job Now (or Schedule Job, scheduling the job and clicking Finish) the Finished > Status screen appears. 18. Review the Items in the

Edit the List of Items for Removal section.

Activity

Step

Tip: To remove an Item from the **List of Items for Removal**, select the corresponding **Remove** check box.

19. Click Run Job Now to have AgLearn complete the un-assignment to User record(s).

Note: See **Scheduling Background Jobs** for more detailed information on scheduling jobs.

20. Review the Status message(s) on the **Finished** screen.

Edit the List of Items for Removal

| Select All / Desclect All | Descle

Successfully removed the items from the specified learners if the items are free floating items and have not

Run Job Now

Finished

Status:

Caution: Do not use the browser's **Back** button when using the UNM Assistant. Use the **Previous** button to move back to previous step(s).

Tip: If a record can not be located, search for the record in other domains. During data entry, the record may have been mistakenly placed in an incorrect domain.

After clicking Next, the

Remind students that

remaining fields are not

After selecting the add

one or more from list

After clicking Search,

the Results tab

appears.

link, the > Search

screen appears.

required fields are

identified by a red

asterisk. Although

required, students should complete as many as they feel necessary.

Step 2: Select

appears.

Learners screen

Remove Competency Profiles from User Record(s) with the **UNM Assistant**

Step **Activity** View 1. Select the User User Management Management menu. 2. Select **Tools** from the left Regions + Tools menu. + Renoces 3. -Supervisor Assistant Select User Needs -<u>User Needs Mamt</u> + Reference Mgmt. 4. Click the Remove Remove Competency Profiles **Competency Profiles** Remove Competencies option button. 5. Click Next to move to Next Step 2. 6. Select the Add one or Add Users more from list link to search for and enter Enter User ID or add one or more from list. Users into the UNM * User ID: Assistant. 7. Search Users On the > Search screen, Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search. enter the appropriate search criteria. Case sensitive search: O Yes No Note: See Managing Data User ID: Starts With Entry and Searches for Last Name Starts With more detailed information on First Name: Starts With searching. Middle Initial: Starts With User Status: Domains: Starts With 8. Click Search. Search 9. On the **Results** tab, select the corresponding LEARNER05 Learner, Bill Add check box for each

LEARNER06

LEARNERO2

User to be added.

Learner, Charlie

Learner, Dashiel

Remove Competency Profiles from User Record(s) with the UNM Assistant

| | Step | Activity | View |
|--|------|---|---|
| | 10. | Click Add. | Add |
| After clicking Add , the Step 2: Select Learners screen appears. | | Review the added Users in the Edit Users section. Tip: To remove a User, select the corresponding Remove check box and click Apply Changes. Click Next to move to Step 3. | Apply Changes |
| After clicking Next, the Step 3: Removing Competency Profiles screen appears. | 13. | Select the Add one or more from list link to search for and enter competency profiles into the list of competency profiles for removal. | Select Competency Profiles for Removal Enter Competency Profile ID or add one or more from list. * Competency Profile ID: |
| After selecting the add one or more from list link, the > Search screen appears. | 14. | On the > Search screen, enter the appropriate search criteria. Note: See Managing Data Entry and Searches for more detailed information on searching. | Case sensitive search: |
| | 15. | Click Search . | Search |
| After clicking Search, the Results tab appears. | 16. | On the Results tab, select the corresponding Add check box for each | Competency Profile ID Competency Profile Title Add FS GS-201 Personnel FS-Forest Fires Forest Fires |
| Clarify that students are building a list of profiles to be removed. | | competency profile to be added to the list of competency profiles for removal. | |
| After clicking Add, the Step 3: Removing Competency Profiles screen appears. | | Click Add . | Add |

Remove Competency Profiles from User Record(s) with the UNM Assistant

Clarify that if a profile was mistakenly added to the Removal list, this action provides a means to correct the error.

Tell students that jobs that will remove multiple items from many Learners can place a strain on system resources. Schedule large jobs for times when most users are off the system.

After clicking Run Job Now (or Schedule Job, scheduling the job and clicking Finish) the Finished > Status screen appears. Step Activity View

18. Review the Competency Profiles in the Edit the List of Competency Profiles for Removal section.

Tip: To remove a Competency Profile from the List of Competency Profiles for Removal, select the corresponding Remove check box.

Run Job Now

Edit the List of Competency Profiles for Adding

Competency Profile ID Title Remove
FS GS-201 Personnel
FS-Forest Fires Forest Fires

Select All / Deselect All

19. Click Run Job Now to have AgLearn complete the un-assignment to User record(s).

Note: See **Scheduling Background Jobs** for more detailed information on scheduling jobs.

20. Review the **Status** message on the **Finished** screen.

Status:

Successfully removed the competency profiles from the specified learners.

Caution: Do not use the browser's **Back** button when using the UNM Assistant. Use the **Previous** button to move back to previous step(s).

Tip: If a record can not be located, search for the record in other domains. During data entry, the record may have been mistakenly placed in an incorrect domain.

Remove Competencies from User Record(s) with the UNM Assistant

View Step **Activity** 1. Select the User User Management Management menu. 2. Select **Tools** from the left Regions + Took menu. + Renundes 3. -Supervisor Assistant Select User Needs -User Needs Mamt Mgmt. + Reference") Click the Remove Remove Competency Profiles Competencies option 🍳 Remove Competencies button. Click Next to move to Next Step 2. 6. Select the Add one or Add Users more from list link to search for and enter Enter User ID or add one or more from list. Users into the UNM * User ID: Assistant. Search Users On the > Search screen, Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search. enter the appropriate search criteria. Case sensitive search: O Yes No Note: See Managing Data User ID: Starts With Entry and Searches for Last Name: Starts With more detailed information on First Name: Starts With searching. Starts With User Status: Starts With 8. Click Search. Search 9. On the **Results** tab select

After clicking Search, the **Results** tab appears.

After clicking Next, the

Remind students that

remaining fields are not

After selecting the add

one or more from list

link, the > Search

screen appears.

required fields are

identified by a red

asterisk. Although

required, students should complete as many as they feel necessary.

Step 2: Select

appears.

Learners screen

Remove Competencies from User Record(s) with the UNM Assistant

Activity Step View 10. Click Add. Add After clicking Add, the 11. Review the added Users Edit Users Step 2: Select in the Edit Users section. Learners screen Select All / Deselect All Tip: To remove a User, appears. select the corresponding Learner, Alec Remove check box and LEARNER05 Learner, Bill LEARNER06 Learner, Charlie click Apply Changes. 12. Click Next to move to Next Step 3. After clicking **Next**, the 13. Select the Add one or Select Competencies for Removal Step 3: Removing more from list link to Competencies screen search for and enter Enter Competency ID or add one or more from list. appears. competencies into the list * Competency ID: of competencies for removal. After selecting the add 14. On the > Search screen, one or more from list Case sensitive search: Yes No enter the appropriate link, the > Search search criteria. Competency ID: Starts With screen appears. Note: See Managing Data Description: Starts With Entry and Searches for more detailed information on Competency Status: Active Not Active Both searching. After clicking Search, 15. Click Search. Search the Results tab appears. Clarify that students 16. On the Results tab, are building a list of select the corresponding FS 201 Creative Thinking Creative Thinking competencies to be Add check box for each FS 201 Customer Service removed. competency to be added to the list of competencies for removal. After clicking Add, the 17. Click Add. Add Step 3: Removing Competencies screen appears.

Remove Competencies from User Record(s) with the UNM Assistant

View

Edit the List of Competencies for Adding

Clarify that if a competency was mistakenly added to the Removal list, this action provides a means to correct the error.

Tell students that jobs that will remove multiple items from many Learners can place a strain on system resources. Schedule large jobs for times when most users are off the system.

After clicking Run Job Now (or Schedule Job, scheduling the job and clicking Finish) the Finished > Status screen appears. 18. Review the Competencies in the Edit the List of Competencies for Removal section.

Activity

Step

Tip: To remove a competency from the List of Competencies for Removal, select the corresponding Remove check box.

19. Click **Run Job Now** to have AgLearn complete the un-assignment to User record(s).

Note: See **Scheduling Background Jobs** for more detailed information on scheduling jobs.

20. Review the Status message on the **Finished** screen.

· Successfully removed the competencies from the specified learners.

Creative Thinking

Apply Changes

Run Job Now

Finished

Status:

FS 201 Creative Thinking

Caution: Do not use the browser's **Back** button when using the UNM Assistant. Use the **Previous** button to move back to previous step(s).

Tip: If a record can not be located, search for the record in other domains. During data entry, the record may have been mistakenly placed in an incorrect domain.

After introducing the task via the Overview, highlight the roles assigned to perform each subtask.

Managing Learning Events

A learning event refers to a User's completion of an Item, or attempt at completion. Subtasks pertaining to **Managing Learning Events** are accessible from the **User Management** menu. User-specific subtasks include the following: **View**, **Edit**, and **Delete a Learning Event**, and **Record a Learning Event for an Item**, **an External Event**, and a **Scheduled Offering**.

A Day-in-the-Life Scenario

A group of Users just completed their required prerequisite reading for a course.

Notes



Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

Edit a Learning Event

Remind students that complete definitions of terms are included in the glossary.

Have students skip to the Record a Learning Event for an Item task in order to have a Learning Event to edit.

Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

Inform students that for the purposes of this training cost is not being addressed and as such they should not enter/change any information on the

Financial tab.

Step Activity View

1. Select the User Management menu.

User Management

2. Select **Tools** from the left menu.

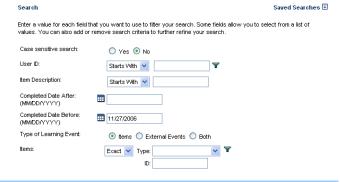


3. Select Learning Event Editor.



4. On the > Search screen, enter the appropriate search criteria.

Note: See Managing Data Entry and Searches for more detailed information on searching.



5. Click Search.



6. Locate the desired event on the **Results** tab.

Tip: Use the **Ctrl+F** function to quickly find an event.



7. Select the **Edit** link corresponding to the desired Learning Event.



Edit a Learning Event

Inform students that any information they enter in the **Comments** field is viewable by many. Advise them to use great caution when entering any comments.

| Step | Activity | View |
|------|--|---|
| 8. | On the Summary tab, make the appropriate changes. | Instructor: Grade: Completion Status: Completion Date: (MMXDD/YYYY) Completion Time: (hixmm AM/PM) Time Zone: Total Hours: (1000,001.01) CPE: (1000,001.01) Credit Hours: (1000,001.01) |
| 9. | Click Apply Changes. | Apply Changes |
| | | |

Remind students that

complete definitions of

terms are included in

Inform students that

they can perform either

a Simple or Advanced

upon the level of detail

Search depending

they need for their

search.

the glossary.

Delete a Learning Event

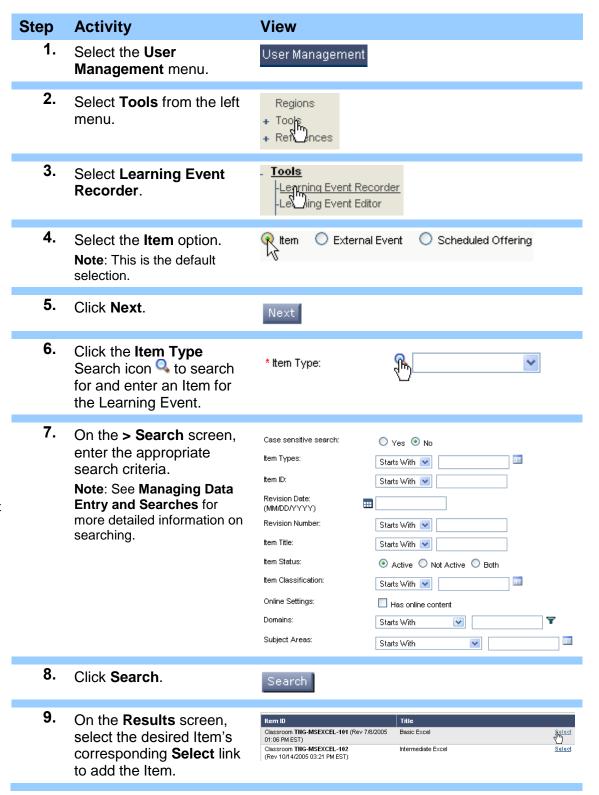
Step **Activity View** 1. Select the User User Management Management menu. 2. Select **Tools** from the left Regions + Took + Refuences menu. Learning Event Recorder Select Learning Event Learning Event Editor Me Users Editor. Saved Searches U On the > Search screen, enter the appropriate Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search search criteria. Case sensitive search: O Yes 💿 No Note: See Managing Data User ID: Starts With Entry and Searches for Item Description: Starts With more detailed information on Completed Date After: searching. Completed Date Before: (MM/DD/YYYY) 11/27/2006 Type of Learning Event: tems ○ External Events ○ Both Exact V Type: 5. Click Search. Search 6. <u>User ID</u> Locate the desired event LEARNER01 Q USDA Nev 5/5/2006 06:24 PN on the Results tab. Raymond USDA-NEWEMPL SYEE Employee Orientation Tip: Use Ctrl+F to quickly 12:09 AM EST) LEARNER01 🞑 📓 Learner, Raymond Classroom TNG-JTF-C-LSFD AMS 5/22/2006 04:00 PM EST Class Completed find an event. Livestock (Rev 11/16/2006 02:23 PM EST) Food Defense Awareness Training (FINAL) Select the Edit link <u>User ID</u> User Name 🔺 LEARNER01 🚨 🖟 corresponding to the Learner, Raymond desired Learning Event. 8. Click Delete. Delete 9. Click **OK** in the Microsoft Internet Explorer Confirmation box. Are you sure you want to delete the learning event? Cancel

Record a Learning Event for an Item

Inform students that they can also add a Learning Event by clicking the Add New link on the Learning Event Editor search screen which will automatically display the Learning Event Recorder.

Examples of Items that would not be Scheduled Offerings include On the Job Training (OJT), an interview, or an article.

Remind students that required fields are identified by a red asterisk. Although remaining fields are not required, students should complete as many as they feel are necessary.



Record a Learning Event for an Item

| Step | Activity | View | |
|------|--|------------------------------------|---|
| 10. | Verify that the associated Item ID appears in the Item ID field. Note: The Revision Date and Title fields will fill in automatically when the Item Type selection icon is used to select an Item. | * Item ID: | TNG-MSEXCEL-101 |
| 11. | Verify the Item's revision date appears in the Revision Date field. Note: If a revision date is not specified, the latest revision of the Item will be assumed. | Revision Date: | 7/8/2005 01:06 PM EST |
| 12. | Verify an Item title appears in the Title field. | Title: | Basic Excel |
| 13. | Click Next . | Next | |
| 14. | Open the Instructor pulldown to choose an Instructor. | Instructor: | FAS-Wilkes GZ123456 88 learner07 |
| 15. | Enter the default grade in the Default Grade field. Note : The default grade can be numeric or ratings-based. | Default Grade: | Light Control of the |
| 16. | Select the default completion status for the User from the Default Completion Status dropdown list. | * Default Completion Status: | Class Completed (Class Completed) - For Credit Class Incomplete (Class Incomplete) - Not For Credit Class Attend (Class Attend) - For Credit Class Waived (Class Waived) - For Credit Class NoShow (Class NoShow) - Not For Credit |
| 17. | Click the Completion Date selection icon to select and enter a completion date. Note : The default entry for this field is the date on which the event is recorded. | * Completion Date: (MM/DD/YYYY) | 11/27/2006 |

Tell students to only

necessary. They can

use the default entry.

change the time zone if

skip the step if they will

Record a Learning Event for an Item

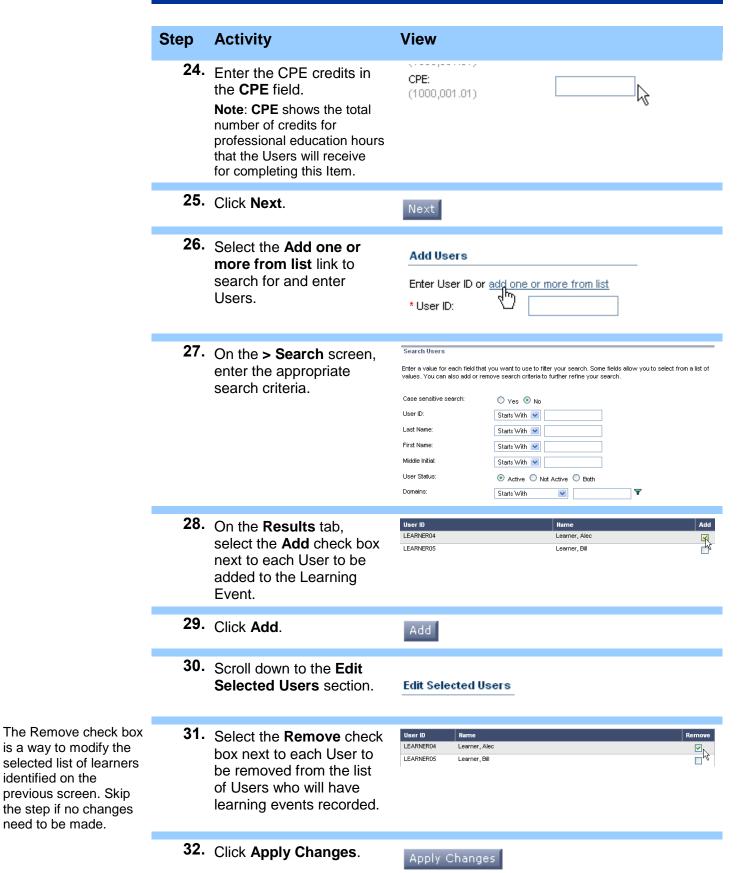
Step **Activity View** 18. Enter the completion time * Completion Time: 10:57 AM (hh:mm AM/PM) in the Completion Time field. Note: The default entry for this field is the time at which the event is recorded. 19. Click the Time Zone Time Zone: EST (Eastern Standard Time) selection icon to search for and enter a time zone. Note: The default entry for this field is obtained from the Item record 20. Enter the default price in Default Price (\$): 0.00 the **Default Price** field, if (1000,001.01) applicable. 21. Enter the number of hours Total Hours: 8.00 in the Total Hours field. (1000,001.01) Note: Total Hours is the total number of hours during which the resources for the Item were in use. 22. Enter the total number of Credit Hours: credit hours that the (1000,001.01) Users will receive for completing this Item in the Credit Hours field. **Note: Credit Hours** indicates the number of unit hours printed on a Certificate (i.e., number of CEUs, CMEs, etc.). 23. Enter the number of Contact Hours: 8.00 (1000,001.01) contact hours for the Item in the Contact Hours field. **Note: Contact Hours** indicates the total number of hours that the Users actually spent on this Item.

identified on the

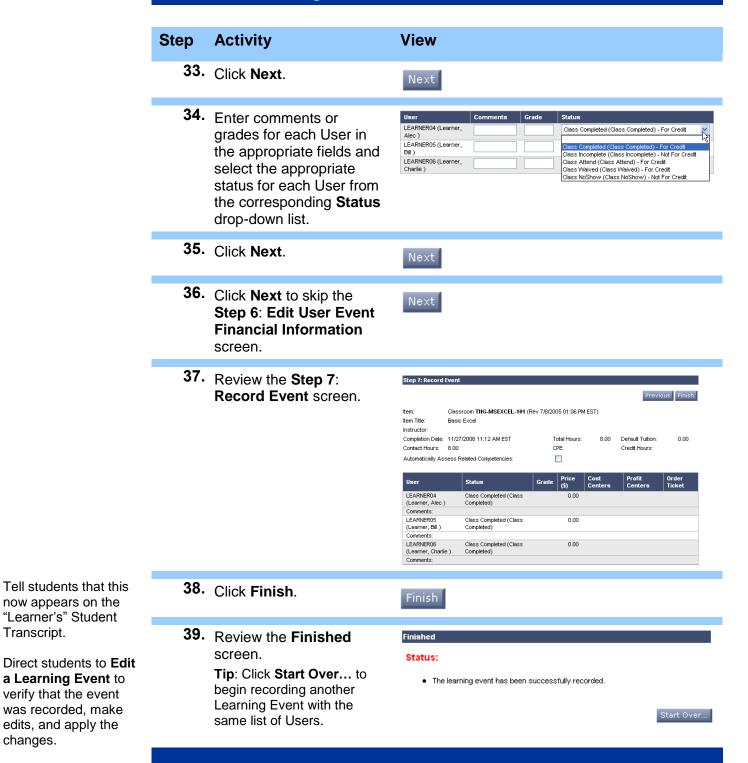
need to be made.

previous screen. Skip

Record a Learning Event for an Item



Record a Learning Event for an Item



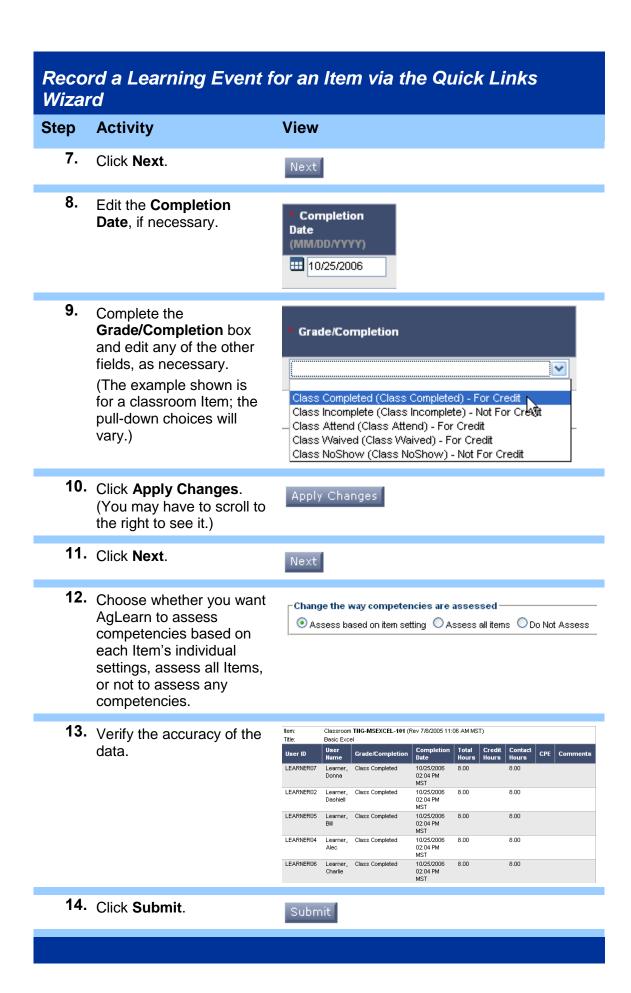
Tip: To avoid data formatting errors, use the Calendar and Selection icon assistants.

Note: See Managing Data Entry and Searches for more detailed information pertaining to the Selection and Calendar icons.

Transcript.

changes.

Record a Learning Event for an Item via the Quick Links Wizard Step **Activity View** Select Record Learning Quick Links: ✓ I Home I from the Quick Links <u>Admin</u> menu at the top of the Create Learning Item Create Scheduled Offering screen. Manage User Needs 2. Select Item in What kind -What kind of learning you want to record? of learning do you want Rttern Scheduled Offering External Event to record? In the Search & Add Search & Add Items Items Box, click the Item Type ID: **Search** icon A next to Item ID. Add Item ID: Search for and add the Case sensitive search: O Yes No Item(s) you wish to give Item Types: \blacksquare Starts With credit for in the resulting Item ID: Starts With 💌 pop-up box. Revision Date: (MM/DD/YYYY) Revision Number: Starts With Item Title: Starts With Item Status: Active ○ Not Active ○ Both Item Classification: Starts With Online Settings: Has online content Domains: Starts With Subject Areas: Starts With In the Search & Add Search & Add Users Users box, click the Search icon A next to User ID: 🖫Ի User ID. Search Users Search for and add the Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values, You can also add or remove search criteria to further refine your search. User(s) to whom you wish to give credit in the O Yes No resulting pop-up box. User ID: Starts With Last Name: Starts With First Name: Starts With Middle Initial: Starts With User Status: Domains: Starts With



Record a Learning Event for an External Event

Remind students that complete definitions of terms are included in the glossary.

Inform students that they can also add a Learning Event by clicking the Add New link on the Learning Event Editor search screen which will automatically display the Learning Event Recorder.

Remind students that required fields are identified by a red asterisk. Although remaining fields are not required, students should complete as many as they feel are necessary.

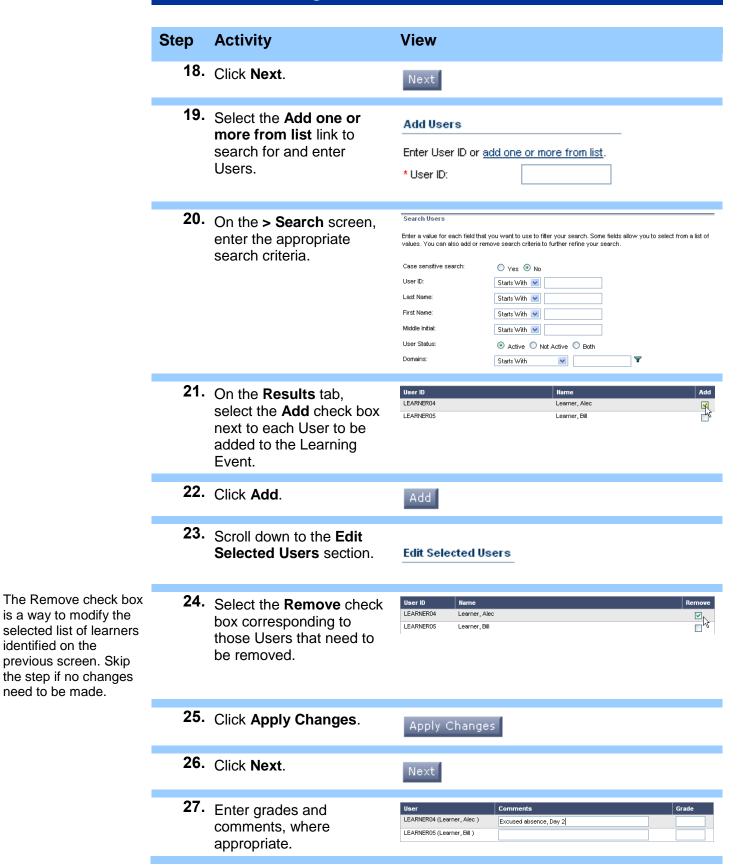
| Step | Activity | View |
|------|---|--|
| 1. | Select the User Management menu. | User Management |
| 2. | Select Tools from the left menu. | Regions + Tools + Refunces |
| 3. | Select Learning Event Recorder . | - <u>Tools</u> -Learning Event Recorder -Learning Event Editor |
| 4. | Select the External Event option. | Ottem Resternal Event Oscheduled Offering |
| 5. | Click Next . | Next |
| 6. | Enter a description of the event in the Description field. | * Description: |
| 7. | Click Next . | Next |
| 8. | Type in the Instructor's name, if known. | Instructor: |
| 9. | Enter the default grade in the Default Grade field. Note : The default grade can be numeric or ratings-based. | Default Grade: |
| 10. | Click the Completion Date selection icon to select and enter a completion date. Note : The default entry for this field is the date on which the event is recorded. | * Completion Date: (MM/DD/YYYY) 11/27/2006 |
| 11. | Enter the completion time in the Completion Time field. Note : The default entry for this field is time at which the | * Completion Time: (hh:mm AM/PM) 10:57 AM |

event is recorded.

Record a Learning Event for an External Event

| | Step | Activity | View | |
|---|------|--|--------------------------------------|--|
| | 12. | Click the Time Zone selection icon to search for and enter a time zone. Note : The default entry for this field is obtained from the Item record. | Time Zone: | EST (Eastern Standard Time) |
| Inform students that for the purposes of this training cost is not being addressed and as such they should not enter any information in the Default Price (\$) field. | 13. | Enter the Default Price in the Default Price field, if applicable. | Default Price (\$): (1000,001.01) | 0.00 |
| | 14. | Enter the number of hours in the Total Hours field. Note: Total Hours is the total number of hours that the resources for the Item were in use. | Total Hours: (1000,001.01) | 8.00 |
| | 15. | Enter the total number of credit hours that the Users will receive for completing this Item in the Credit Hours field. Note: Credit Hours indicates the number of unit hours printed on a Certificate (i.e., number of CEUs, CMEs, etc.). | Credit Hours: (1000,001.01) | Lie Control of the Co |
| | 16. | Enter the number of contact hours for the Item in the Contact Hours field. Note: Contact Hours are the total number of hours that the Users actually spent on this Item. | Contact Hours; (1000,001.01) | 7 |
| | 17. | Enter the CPE credits in the CPE field. Note: CPE shows the total number of credits for professional education hours that the Users will receive for completing this Item. | CPE: (1000,001.01) | |

Record a Learning Event for an External Event



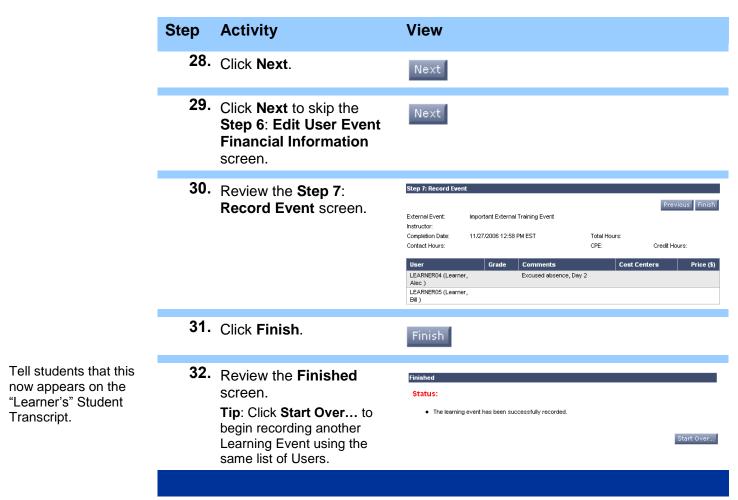
is a way to modify the

previous screen. Skip

identified on the

need to be made.

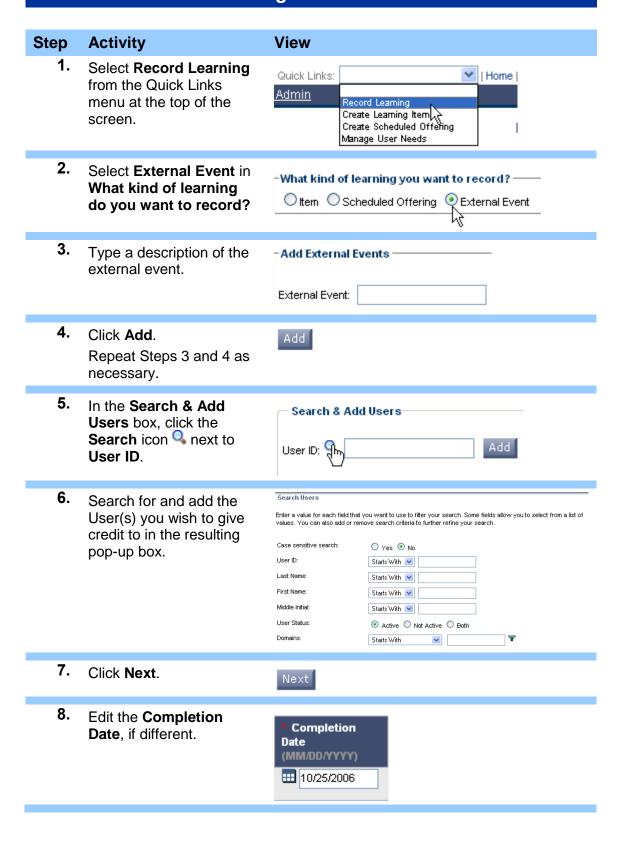
Record a Learning Event for an External Event



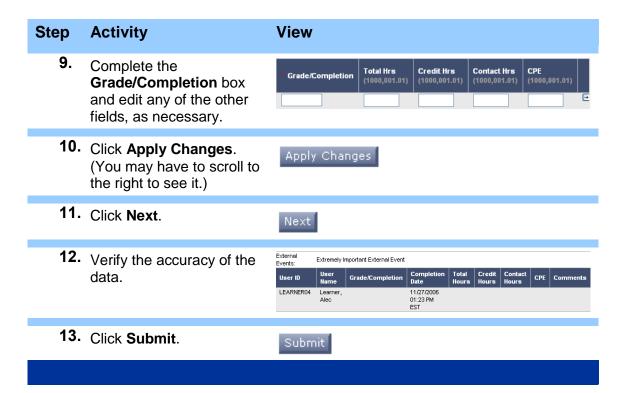
Tip: To avoid data formatting errors, use the Calendar and Selection icon assistants.

Note: See **Managing Data Entry and Searches** for more detailed information pertaining to the **Selection** and **Calendar** icons.

Record an External Learning Event via the Quick Links Wizard



Record an External Learning Event via the Quick Links Wizard



Remind students that complete definitions of terms are included in the glossary.

Inform students that they can also add a Learning Event by clicking the Add New link on the Learning Event Editor search screen which will automatically display the Learning Event Recorder.

Remind students that required fields are identified by a red asterisk. Although remaining fields are not required, students should complete as many as they feel are necessary.

Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

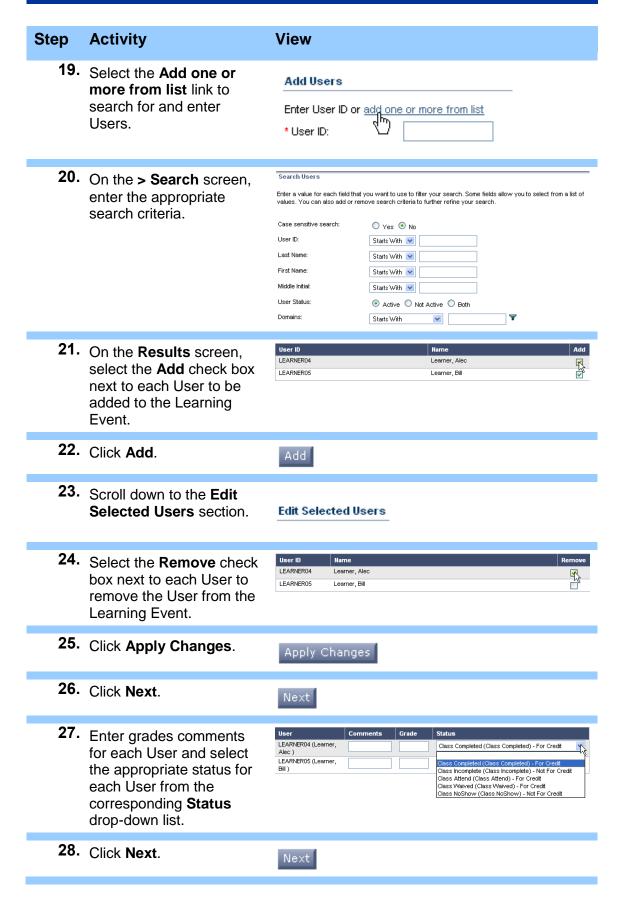
Record a Learning Event for a Scheduled Offering

Step **Activity** View 1. Select the User User Management Management menu. 2. Select **Tools** from the left Regions + Tools menu. + Ref∟ences Tools Select Learning Event -<u>Learning Event Recorder</u> Recorder. -LeWing Event Editor 4. Select the Scheduled External Event Scheduled Offering Offering option. 5. Click Next. Next 6. Click the **Scheduled** * Scheduled Offering Search icon Q Offering ID: to search for and enter a Scheduled Offering. Search Scheduled Offerings 7. On the > Search screen, Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search. enter the appropriate search criteria. Case sensitive search: **Note:** See Managing Data Offering Type: O Item offering type O Schedule Block offering type O Both Entry and Searches for Scheduled Offering ID: Starts With more detailed information on Item/Schedule Block ID: Starts With searching. Description: Starts With Start Date After: (MM/DD/YYYY) 10/26/2006 Start Date Before: (MM/DD/YYYY) 8. Click Search. Search 9. On the **Results** tab. Classroom TNG-MSEXCEL-101 (Rev select the desired 7/8/2005 01:06 PM EST) Classroom TNG-MSEXCEL-101 (Rev 7/8/2005 01:06 PM EST) Scheduled Offering's corresponding Select link to add the Scheduled Offering. 10. Click Next. Next 11. Enter the name of the Instructor: instructor in the Instructor field.

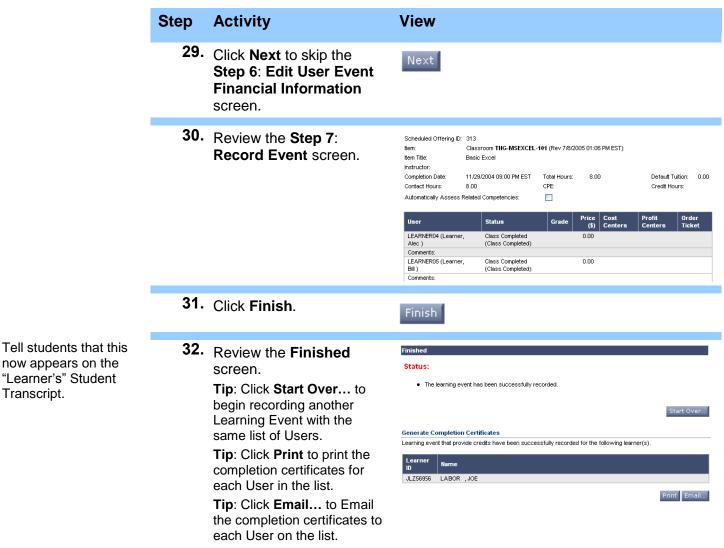
Record a Learning Event for a Scheduled Offering

| | Step | Activity | View | |
|---|------|---|--------------------------------------|--|
| | 12. | Enter the default grade in the Default Grade field. Note : The default grade should be a percentage. | Default Grade: | |
| | 13. | Select the default completion status from the Default Completion Status drop-down list. | * Default Completion Status: | Class Completed (Class Completed) - For Credit Class Incomplete (Class Incomplete) - Not For Credit Class Attend (Class Attend) - For Credit Class Waived (Class Waived) - For Credit Class NoShow (Class NoShow) - Not For Credit |
| | 14. | Enter the number of hours in the Total Hours field. Note: Total Hours is the total number of hours that the resources for the Item were in use. | Total Hours: (1000,001.01) | 7 |
| | 15. | Enter the total number of credit hours that the Users will receive for completing this Item in the Credit Hours field. Note: Credit Hours is the number of unit hours printed on a Certificate (i.e., number of CEUs, CMEs, etc.). | Credit Hours: (1000,001.01) | 7 |
| Tell students that for the purposes of this training cost is not being addressed and as such they should not enter any information in the Default Price (\$) field. | 16. | Enter the number of contact hours for the Item in the Contact Hours field. Note: Contact Hours is the total number of hours that the Users actually spent on this Item. | Contact Hours: (1000,001.01) | |
| | 17. | Enter the CPE credits in the CPE field. Note: CPE is the total number of credits for professional education hours that the Users will receive for completing this Item. | CPE: (1000,001.01) | |
| | 18. | Click Next. | Next | |

Record a Learning Event for a Scheduled Offering



Record a Learning Event for a Scheduled Offering



Tip: To avoid data formatting errors, use the Calendar and Selection icon assistants.

Note: See **Managing Data Entry and Searches** for more detailed information pertaining to the **Selection** and **Calendar** icons.

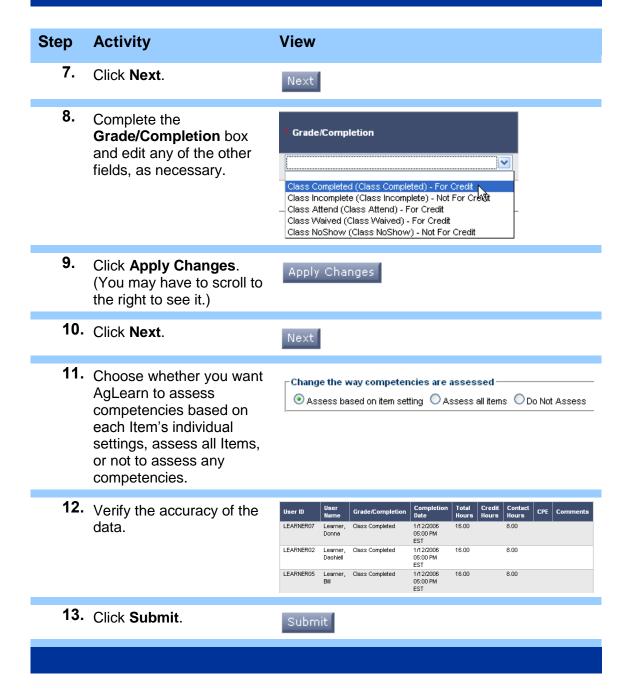
Record a Learning Event for a Scheduled Offering via the Quick Links Wizard



Record a Learning Event for a Scheduled Offering via the Quick Links Wizard

Activity View Step 2. Select Scheduled What kind of learning you want to record? Offering in What kind of Item Scheduled Offering External Event learning do you want to record? 3. In the Search & Add Search & Add Offerings Offerings Box, click the Search icon a next to Add Scheduled Offering ID: Scheduled Offering ID. (If you know the numeric ID of the Scheduled Offering, you may type it directly in the box, and click Add.) Search for and add the Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of Item(s) for which you wish values. You can also add or remove search criteria to further refine your search. to give credit in the Case sensitive search: O Yes No resulting pop-up box. Offering Type: O Item offering type O Schedule Block offering type O Both Scheduled Offering ID: Starts With Item/Schedule Block ID: Starts With Description: Starts With Start Date After: (MM/DD/YYYY) 10/26/2006 Start Date Before: (MM/DD/YYYY) 5. In the Search & Add Search & Add Users Users box. click the Auto Fill From Registration User ID: 🛼 **Search** icon A next to User ID. (If you want AgLearn to automatically populate the class roster for you to edit as needed, click Auto Fill From Registration.) Search Users Search for and add the Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search. User(s) to whom you wish to give credit in the Case sensitive search: O Yes No resulting pop-up box. User ID: Starts With Last Name: Starts With First Name Starts With Middle Initial Starts With User Status Starts With

Record a Learning Event for a Scheduled Offering via the Quick Links Wizard



After introducing the task via the Overview, highlight the roles assigned to perform each subtask.

Reports

AgLearn data can be displayed and printed by running a report. AgLearn provides many different report options, each of which offers various grouping, sorting, format and print options.

Subtasks pertaining to reports are accessible from the **Reports** menu. All report subtasks provide a method to identify and filter the data shown as well as a screen to identify grouping, sorting, and format options. The report subtasks chosen to illustrate typical report activity steps are the **Run a Class Roster Report**, **Run a Certificate of Completion Report**, **Run a Compliance Report**, and **Run a Deficiency Report**.

A Day-in-the-Life Scenario

A mandatory Workplace Violence Workshop is being offered tomorrow. You have been asked to provide the instructor with a roster of all registrants. Once the workshop is completed, you will need to print a certificate of completion for each attendee. Next week, you will need to generate a compliance report that identifies the percentage of employees who have completed this mandatory workshop.

Notes

Run a Class Roster Report

| | Step | Activity | View | |
|---|------|--|--|--------------|
| Remind students that complete definitions of terms are included in the glossary. | 1. | Select the Reports menu. | Reports | |
| Remind students that not all reports are accessible by all roles. | 2. | Select the Learning link. | + Performance + Learning + Con t | |
| Remind students that the number and type of reports a user is allowed to access will vary depending upon the user's permissions within the LMS. | 3. | Select the Class Roster link. | -Class Progress -Class Roster -Curk (a) a with Related Job Positions | |
| Remind students that required fields are identified by a red asterisk. Although remaining fields are not | 4. | Enter a report title in the Report Title field. Note: The Report Title default is set to display the name of the actual report. | Report Title: | Class Roster |

Run a Class Roster Report

required, students should complete as many as they feel are necessary.

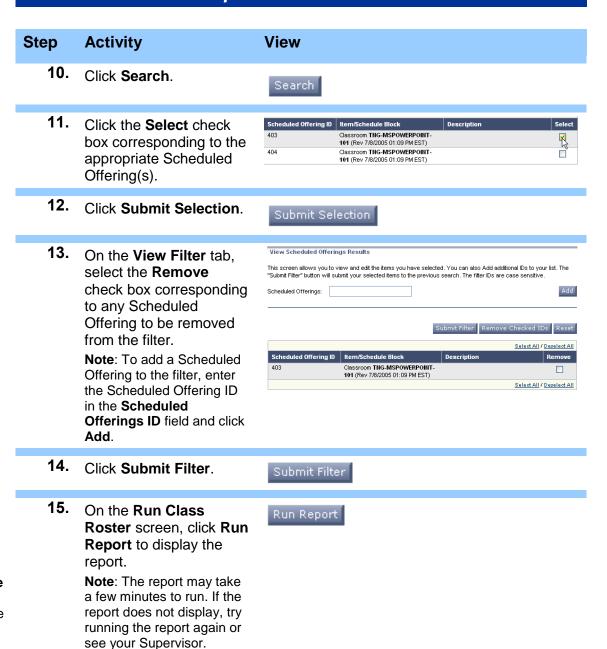
| Step | Activity | View | |
|------|--|---|--|
| 5. | Enter a header and footer for the report in their respective fields. Note: Report Header and Footer do not have a default setting. | Report Header: Report Footer: | |
| 6. | Click either the Browser or Local File view option to select a report destination. Note: Browser is the default selection, and when selected, it displays the report within the browser. Local File saves the report to your computer. | Report Destination: | ि Browser O Local File |
| 7. | Click a Report Format option button/box to change the report format. Note: The Report Format default is set to HTML with the Mask User IDs check box selected and the Page Break Between Records checkbox unselected. | Report Format: | ○ XML ○ CSV PHTML ○ PDF |
| 8. | Click the Filter icon to search for a Scheduled Offering. | Scheduled Offering: | Exact V |
| 9. | On the Create Filter tab, enter the appropriate | Search Scheduled Offerings Enter a value for each field that you want to use values. You can also add or remove search crite | to filter your search. Some fields allow you to select from a list of ria to further refine your search. |

Scheduled offering IDs can be entered directly into the appropriate field. However, it may be easier to select the scheduled offering(s) from a list, since the IDs may be difficult to memorize.

> criteria for filtering the Scheduled Offering request.

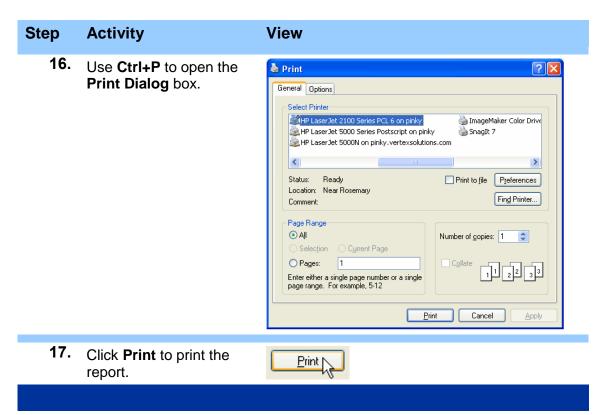
| Search Scheduled Offerings | Search Scheduled Offerings | | | |
|---|---|--|--|--|
| Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search. | | | | |
| Case sensitive search: | ○ Yes 		 No | | | |
| Offering Type: | Ottem offering type O Schedule Block offering type Both | | | |
| Scheduled Offering ID: | Starts With 💌 | | | |
| Item/Schedule Block ID: | Starts With 💌 | | | |
| Description: | Starts With 💌 | | | |
| Start Date After: (MM/DD/YYYY) | 10/26/2006 | | | |
| Start Date Before: (MM/DD/YYYY) | | | | |
| | | | | |

Run a Class Roster Report



Inform students that if the number of records in the report exceeds the predefined threshold, they will be directed to a **Schedule Job** screen in order to specify a date and time to run the report as a background job.

Run a Class Roster Report



Note: For additional information about scheduling a background job, see Scheduling a Background Job.

Run a Certificate of Completion Report

Remind students that complete definitions of terms are included in the glossary.

2. Select User
Management from the

Select the **Reports** menu.

Activity

left menu.

Step

1.

Reports

+ Learning

View

3. Select the Certificate of Completion link.

-Account Data -Certificate of Completion -Certification for Offerings

+ User Management + Perfol

Remind students that required fields are identified by a red asterisk. Although remaining fields are not required, students should complete as many as they feel are necessary.

4. Enter a report title in the **Report Title** field.

Note: The **Report Title** default is set to display the name of the actual report.

Report Title:

Certificate of Comple

 Click either the Browser or Local File view option to select a report destination.

> Note: Browser is the default selection and when selected, it displays the report within the browser. Local File saves the report to your computer.

Report Destination:

Browser O Local File

6. Click the **PDF** option to select PDF as a report format.

Note: **PDF** is the default selection and when selected, the report displays as a PDF.

Report Format:

PDF

7. Enter the name of the instructor in the Signature Text field.

Signature Text:

Irv Instructor

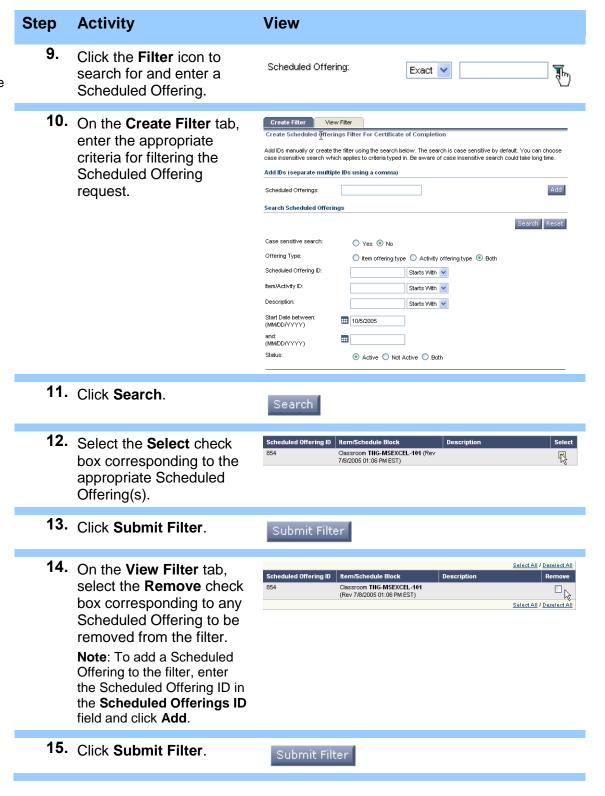
8. Enter a completion date in the Completion Date field.

Completion Date:

November 27, 2006

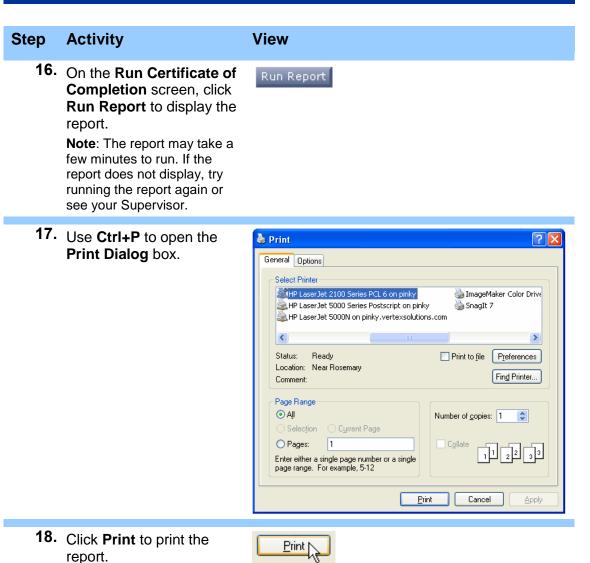
Run a Certificate of Completion Report

If known, scheduled offering IDs can be entered directly into the appropriate field. However, it may be easier to select the scheduled offering(s) from a list, since the IDs may be difficult to memorize.



Run a Certificate of Completion Report

Inform students that if the number of records in the report exceeds the predefined threshold, they will be directed to a **Schedule Job** screen in order to specify a date and time to run the report as a background job.



Note: For additional information about scheduling a background job, see Scheduling a Background Job.

Run a Bulk Student Component Status Report

Remind students that complete definitions of terms are included in the glossary.

Remind students that not all reports are accessible by all roles.

Remind students that the number and type of reports a user is allowed to access will vary depending upon the user's permissions within the LMS.

| Step | Activity | View |
|------|---|---|
| 1. | Select the Reports menu. | Reports |
| 2. | Select System Admin from the left menu. | + Content + System Admin Agle arn. USDA. |
| 3. | Select the Custom Reports link. | -Background Report Jobs - <u>Pustom Reports</u> -Badernal Reports |
| 4. | On the > Search Custom Reports screen, enter the search parameters in the Report Name field, or leave it blank to see all custom reports. | Case sensitive search: |
| 5. | Click Search . | Search |
| 6. | Select the View link for the Bulk Student Component Status report. | AgLearn Login Report BulkStudentComponentStatus BulkStudentData |
| 7. | Click the Run button. | Run |
| 8. | Enter a report title in the Report Title field. Note: The Report Title default is set to display Student Component Status Report. | Report Title: Student Component S |
| 9. | Enter a header and footer for the report in their respective fields. Note: The Report Header and Footer do not have a default setting. | Report Header: Report Footer: |
| | | |

Run a Bulk Student Component Status Report

View Step **Activity** 10. Click either the Browser R Browser O Local File Report Destination: or Local File view option to select a report destination. Note: Browser is the default selection and when selected. it displays the report within the browser. Local File saves the report to your computer. 11. Click a Report Format Report Format: O XML O CSV RHTML O PDF option button/box to change the report format. Note: The Report Format default is set to PDF with the Mask User IDs check box selected and the Page Break Between Records checkbox unselected. 12. Select the Filter icon to Domain: Exact 💌 search for a Domain. 13. On the Create Filter tab, Search Domains enter the appropriate criteria for filtering the User Case sensitive search: O Yes No request. Domain ID: Starts With Description: Starts With 14. Click Search. Search 15. Select the Select check box corresponding to the **⊞** OCIO appropriate domain(s). **⊞** OCIO-ACIO 16. Click Add to Filter.

Add to Filter

Learner IDs can be entered directly into the appropriate field. However, it may be easier to select the scheduled offering(s) from a list, since the IDs may be difficult to memorize.

Item IDs can be

appropriate field.

However, it may be

easier to select the

Item(s) from a list,

since the IDs may be

difficult to memorize.

23. Click Submit Filter.

entered directly into the

Run a Bulk Student Component Status Report

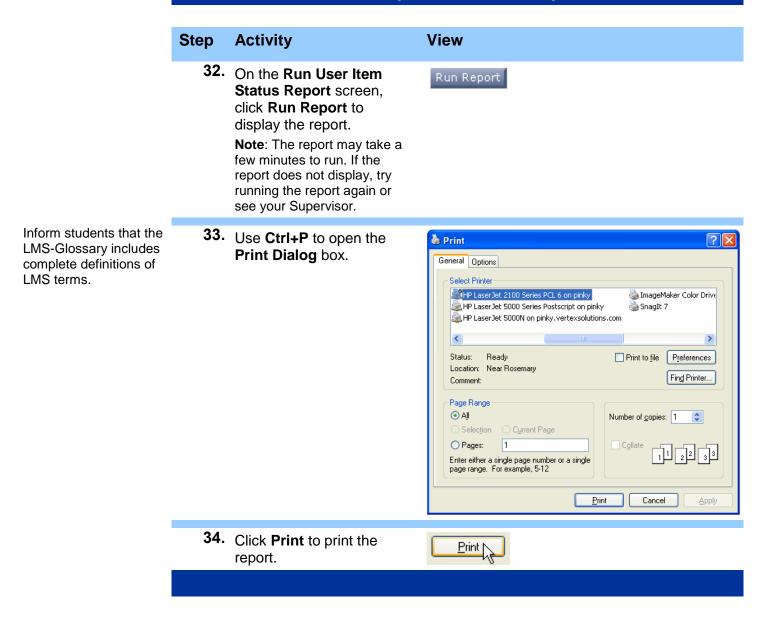
Step **Activity** View 17. On the Edit Domain Results screen, select the Select / Deselect Al Remove check box corresponding to any OCIO-ACIO No Domain to be removed from the filter. Note: This step is performed only if you want to remove some of the domains in the filter. 18. Click Submit Filter. Submit Filter 19. Select the Filter icon to Domain: [2 Selected] 🕎 🥡 search for an Item. Item Exact V Type: Note: The Domain Select ID: from list link indicates you have already selected a number of domains in this filter. 20. Follow standard search Case sensitive search: O Yes 💿 No procedures to select the Item Types: Starts With Item(s) of your choice. Item ID: Starts With 💌 Note: See Managing Data Revision Date: Entry and Searches for (MM/DD/YYYY) more detailed information. Revision Number Starts With 💌 Item Title: Starts With Item Status: Active O Not Active O Both Item Classification: Starts With Online Settings: Has online content Domains: Starts With Subject Areas: Starts With 21. Click Search. Search 22. Click the Select check box Select All / Deselect All corresponding to the Assessment USDA-CYBERSECURITY-XMPT-FY06 (Rev 6/9/2006 09:21 AM EST) appropriate Item(s). CD-ROM USDA-CYBERSECURITYCD-FY06 USDA Security Literacy and Basics FY 2006 by CD Ŏ Web Based USDA-CYBERSECURITY-FY06 (Rev 11/8/2005 11:42 AM EST) USDA Security Literacy and Basics FY 2006

Submit Filter

Run a Bulk Student Component Status Report

Step **Activity** View 24. On the View Item Results Select All / Deselect All screen, select the Remove Assessment USDA-CYBERSECURITY-XMPT-FY06 (Rev 6/9/2006 09:21 AM EST) 1 Security Literacy and Basics training check box corresponding Select All / Deselect All to any Item to be removed from the filter. Note: This step is performed only if you want to remove some of the Items in the filter. 25. Click Submit Filter. Submit Filter 26. Select the Select from list Completion Status: Exact 💌 icon to search for a Completion Status. 27. On the Create Filter tab, click the **Select** check box Brief Read Brief Read CD-ROM Complete CD-ROM Complete corresponding to the appropriate completion status. 28. Click Submit Selection. Submit Selection 29. On the View Filter tab, select the **Remove** check This screen allows you to view and edit the items you have selected. You can also Add additional IDs to your list. The "Submit Filter" button will submit your selected items to the previous search. The filter IDs are case sensitive. box corresponding to any completions status to be Completion Status: removed from the filter. Note: This step is performed only if you want to remove a Select All / Deselect All compliance status from the filter. Select All / Deselect All Submit Filter Remove Checked IDs Reset 30. Click Submit Filter. Submit Filter 31. Click the Completed Date Completed Date From: Calendar icons to select (MM/DD/YYYY) and enter the dates Completed Date To: between which you want (MM/DD/YYYY) training compliance information on your report.

Run a Bulk Student Component Status Report



Note: For additional information about scheduling a background job, see Scheduling a Background Job.

Run a User Learning History Report

| | Step | Activity | View | |
|---|------|--|--|----------------------|
| Remind students that complete definitions of erms are included in the glossary. | 1. | Select the Reports menu. | Reports | |
| | 2. | Select User Management from the left menu. | + User Management + Perfol Once + Learning | |
| Remind students that not all reports are accessible by all roles. | 3. | Select the Learning History link. | -Job Position Detail - <u>Learning History</u> -Learning Hours | |
| Remind students that the number and type of reports a user is allowed to access will wary depending upon the user's permissions within the LMS. | 4. | Enter a report title in the Report Title field. Note: The Report Title default is set to display the name of the actual report. | Report Title: | Learner Learning His |
| | 5. | Enter a header and footer for the report in their respective fields. Note: Report Header and Footer do not have a default setting. | Report Header: Report Footer: | |
| | 6. | Click either the Browser or Local File view option to select a report destination. Note: Browser is the default selection and when selected, it displays the report within the browser. Local File saves the report as a file on your computer. | Report Destination: | Rrowser O Local File |
| | 7. | Click a Report Format option button/box to change the report format. Note: The Report Format default is set to HTML with the Mask User IDs check box selected and the Page Break Between Records checkbox unselected. | Report Format: | O XML O CSV |

Learner IDs can be

easier to select the

scheduled offering(s)

from a list, since the

memorize.

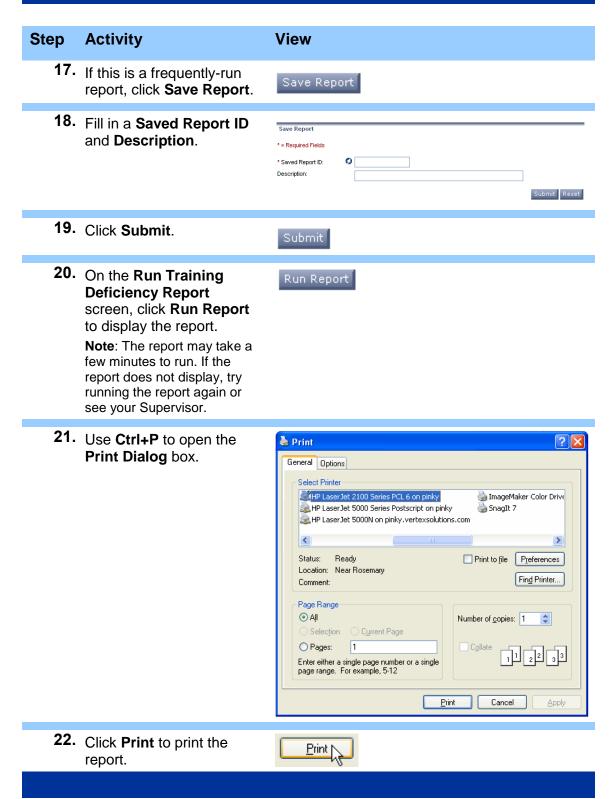
IDs may be difficult to

entered directly into the appropriate field.
However, it may be

Run a User Learning History Report

Step **Activity** View 8. Select the Filter icon to User: Exact 💌 search for a User. Search Heers 9. On the Create Filter tab. Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of values. You can also add or remove search criteria to further refine your search. enter the appropriate criteria for filtering the O Yes 💿 No User request. User ID: Starts With Last Name: Starts With First Name: Starts With Middle Initial Starts With Active O Not Active O Both Domains: Starts With 10. Click Search. Search 11. Click the Select check box LEARNER04 corresponding to the appropriate User(s). LEARNER06 Learner, Charlie 12. Click Submit Selection. Submit Selection 13. On the View Filter tab, select the **Remove** check LEARNEROS Learner, Bill box corresponding to any LEARNER06 Learner, Charlie User to be removed from the filter. Note: This step is performed only if you want to remove some of the Users in the filter. 14. Click Submit Filter. Submit Filter 15. Click the Completed Date Completed Date From: Calendar icons to select (MM/DD/YYYY) and enter the dates Completed Date To: between which you want (MM/DD/YYYY) training deficiency information on your report. **16.** Click the **Detail** radio Report Type: Summary O Detail button if a detailed report is desired. Note: The Summary button is checked by default.

Run a User Learning History Report



Note: For additional information about scheduling a background job, see Scheduling a Background Job.

After introducing the task via the Overview, highlight the roles assigned to perform each task.

Reinforce the notion that based on the student's role, the tasks available for scheduling as background jobs vary.

The Learner Needs Management Assistant is available through the Learner Management menu.

The Item Revision
Assistant is accessed by selecting Revise...
when editing an Item.

Scheduling Background Jobs

Tasks that can be time-consuming, include too many records, or dramatically affect system performance should be run as background jobs. **Background jobs** are tasks that are scheduled to run at off-peak work hours, where they can be performed without overloading the system.

Background jobs are scheduled for the tasks available through the **User Needs Management Wizard**, the **Item Revision Wizard**, and for system **Reports**.

Background job scheduling tasks include View and Schedule a Background Job.

Note: Scheduling a background job is performed during the final step of specific tasks, when both the **Run Job Now** and **Schedule Job** buttons appear.

The tasks available for scheduling as background jobs through the User Needs Management Assistant can include: Add and Remove Curricula, Add and Remove Items, Add and Remove Competency Profiles, Add and Remove Competencies, Add Job-related Curricula, and Add Job-related Competency Profiles. See User Needs Management Assistant for more detailed information on performing these tasks.

Background jobs can also be scheduled for revising Items, through the **Item Revision Assistant**. See **Managing Items** for more detailed information on using the Item Revision Assistant.

The reports available through the **Reports** menu may be scheduled as background jobs. See **Reports** for more detailed information on running reports.

A Day-in-the-Life Scenario

Your supervisor has requested to see an Instructor Data report of all active instructors currently assigned to teach Items through AgLearn. He has asked for a printed copy by next Thursday, aware that running the report would be a burden on the system during peak work hours.

Notes

Remind students that complete definitions of terms are included in the glossary.

View a Background Job

| Step | Activity | View |
|------|--|--|
| 1. | Select the Reports menu. | Reports |
| | | |
| 2. | Select System Admin from the left menu. | + Content + System Admin Agleann. USDA. |
| 2 | | L A construction Chartering |
| 3. | Select Background Jobs . | -Approvals Status -Background Jobs -Background Report Jobs |
| | | |

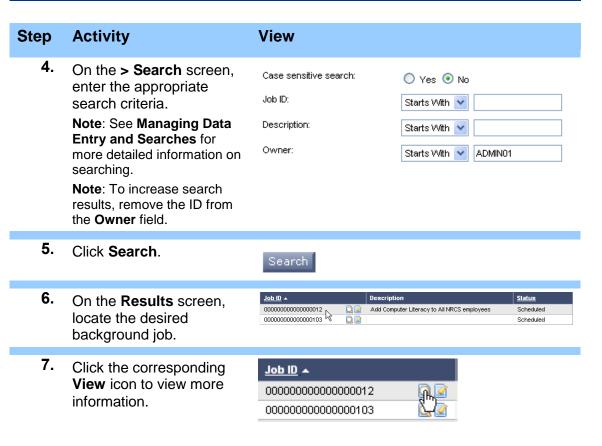
View a Background Job

Scheduling a task to run as a background job is done when the task is created. Show students that the only links available on the Background Jobs > Search screen are Search and Help.

Background jobs include completion statuses of: Scheduled, Success, and Failed.

Tell students that they will only see their own background jobs

Only the System Administrator can see all background jobs.



Schedule a Background Job

Click Schedule Job.

Note: Background jobs are

AgLearn module requesting

scheduled from within the

Activity

Step

1.

4.

Remind students that complete definitions of terms are included in the glossary.

as an example.

2. Select the Schedule this job to be executed on option button.

the job. User Needs Management is used here

Schedule this job to be executed on: View Available Time Slots

3. Select the View
Available Time Slots link
to see times when the job
can be performed.

Review the available

Description field.

View Available Time Slots

> Schedule Background Job > View allowable times

View

Schedule Job

The Allowable Dates/Times For Background Jobs pop-up window appears.

timeframes from the list Allowable Dates/Times For Background Jobs displayed in the Timeframe 0: O Hour(s) between 0 and 5
O Monday Allowable Dates/Times Timeframe 1 For Background Jobs O Hour(s) between 0 and 5
O Tuesday window. Timeframe 2: Timeframe 4: 5. Click Close. Close 6. Click the **Date** Calendar icon to select and enter the date the background job will run. 7. Enter a Time for the Time: background job to run. (hh:mm AM/PM) 8. Click the Time Zone Time Zone: EST (Eastern Standard Time) selection icon to search for and enter a Time Zone. Enter a brief description Job Description: of the job in the Job B

Schedule a Background Job

| Step | Activity | View |
|------|--|--|
| 10. | Select the Notify via email upon completion check box to send a notification e-mail. | Notify via email upon completion |
| 11. | Enter the e-mail address for notification in the Email field. | Email: |
| 12. | Select the Email the Report check box to receive a copy of a report with the notification e- mail. Note: The Email the Report check box appears only for Reports. | Email the Report |
| 13. | Click Finish . | Finish |
| 14. | Verify that the background job has been scheduled on the Status screen. Note : Only a System Administrator may reschedule and/or delete background jobs. | Finished Status: • Your job has been scheduled to run in the background. The job ID is 00000000000000000000000000000000000 |
| | 10. 11. 12. | 10. Select the Notify via email upon completion check box to send a notification e-mail. 11. Enter the e-mail address for notification in the Email field. 12. Select the Email the Report check box to receive a copy of a report with the notification e-mail. Note: The Email the Report check box appears only for Reports. 13. Click Finish. 14. Verify that the background job has been scheduled on the Status screen. Note: Only a System Administrator may reschedule and/or delete |

After introducing the task via the Overview. highlight the roles assigned to perform each task.

Managing Instructors

An instructor is any person who delivers learning. AgLearn tracks Instructors not only by name, location, and availability, but can keep records about which Items an instructor is authorized to teach. Subtasks pertaining to Managing Instructors are accessible from the Instructors menu. Managing Instructors tasks include: View, Add, Edit, Delete, and Add Authorized Items to Instructors, and Remove Authorized Items from Instructors.

A Day-in-the-Life Scenario

A new instructor has been hired. You need to:

- Add the instructor to AgLearn
- Add two (2) Items that the instructor has been authorized to teach

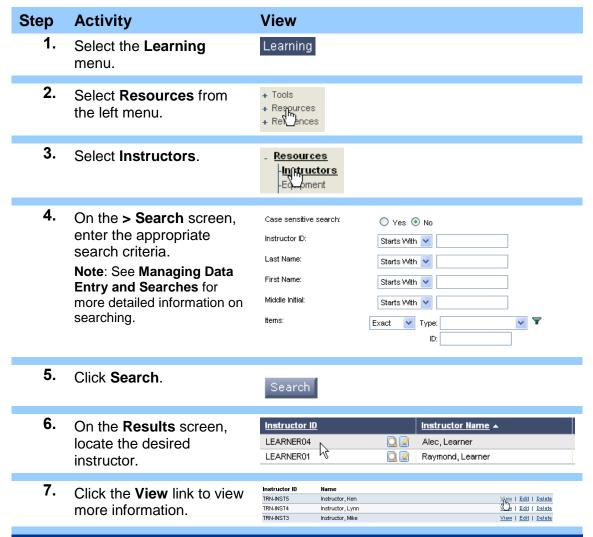
Notes

View an Instructor Record

Remind students that terms are included in

complete definitions of the glossary.

Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.



Add an Instructor Record

Remind students that complete definitions of terms are included in the glossary.

Step **Activity View** 1. Select Learning from the Learning top menu. 2. Select **Resources** from + Tools + Respurces + Respurces the left menu. 3. Select Instructors. Resources <u>Instructors</u> Eq., pment 4. Select the Add New link. Search | Adrl New | Help | Enter the Instructor ID * Instructor ID: 6. Enter the instructor name Last Name: in the Last Name, First, and MI fields accordingly. 7. Enter the instructor Company: company in the Company field, if known. 8. Click the **Domain** PUBLIC * Domain: Selection icon to search for and enter a domain. 9. Click the **Organization** Organization: Selection icon to search for and enter an organization. 10. Enter an e-mail address Email Address: in the Email Address field. 11. Enter any comments Comments: concerning the instructor in the Comments field.

For the Instructor ID field, make sure that students do **NOT** enter data in the field, but **DO** check the box to Auto Generate the ID.

Inform students that required fields are identified by a red asterisk, and that the remaining fields are not required. However, encourage them to capture as much information as possible.

Add an Instructor Record

| Step | Activity | View | |
|------|---|---------|------------|
| 12. | Select the Active check box if the instructor has been designated as active. | Active: | 1 7 |
| 13. | Click Add. | Add | |
| | | | |

Edit an Instructor Record

Activity

Step

Remind students that complete definitions of terms are included in the glossary.

Select Learning from the top menu.

Learning

View

2. Select **Resources** from the left menu.



3. Select Instructors.



Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

4. On the > Search screen, enter the appropriate search criteria.

Note: See Managing Data Entry and Searches for more detailed information on searching.



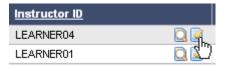
5. Click Search.

Search

6. On the **Results** tab, locate the desired instructor.



7. Click the corresponding **Edit** icon to edit the instructor information.



Inform students to make all necessary changes using the tabs available. However, caution them to click **Apply Changes** before selecting a different tab. Otherwise they will lose all their changes and modifications.

8. Make the appropriate changes and click **Apply Changes**.

Caution: Do not select a different tab prior to clicking **Apply Changes** or all changes and modifications will be lost.

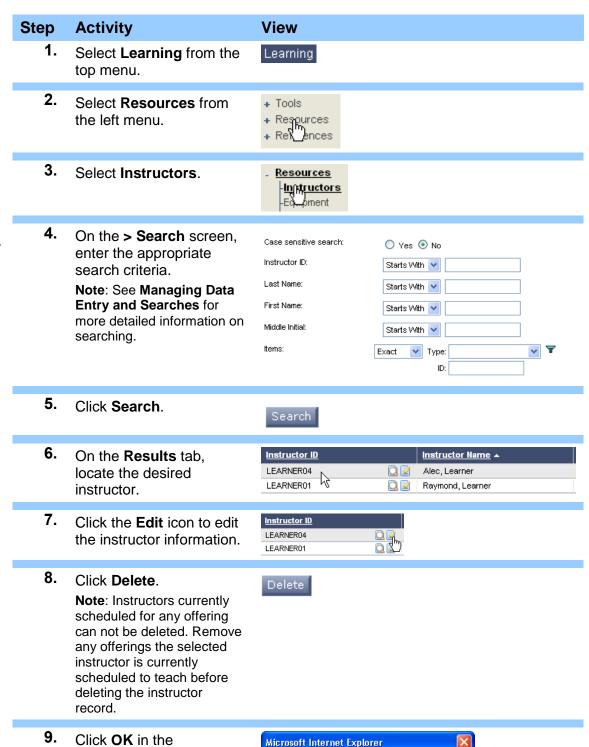
Apply Changes

Delete an Instructor Record

Confirmation box.

Remind students that complete definitions of terms are included in the glossary.

Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.



Are you sure you want to delete this instructor?

Cancel

Delete an Instructor Record

Step Activity View

Add Authorized Items to Instructors

Remind students that complete definitions of terms are included in the glossary.

1. Select Learning from the Learning top menu.

2. Select **Resources** from the left menu.

+ Tools + Respurces + Respurces

View

3. Select Instructors.

Activity

Step



Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

4. On the > Search screen, enter the appropriate search criteria.

> Note: See Managing Data Entry and Searches for more detailed information on searching.

Case sensitive search: O Yes

No Instructor ID: Starts With Last Name: Starts With First Name: Starts With Middle Initial: Starts With ltems: Exact Type: ID:

Instructor Name 🔺

Raymond, Learner

Alec, Learner

5. Click Search.

Search

Instructor ID

LEARNER04

6. On the **Results** tab, locate the desired instructor.

7. Click the corresponding Edit icon to edit the instructor information.



Q 📝

Q 📝

8. Click the Authorized to Teach tab.



After selecting the Authorized tab, the > Search > Search Results > Edit **Authorized to Teach** screen appears.

Add Authorized Items to Instructors

14. Click Add.

Tell students that they are not prevented from scheduling an instructor for an offering of an Item even if the instructor is not authorized to teach that Item.

After selecting the add one or more from list link, the Item > **Search** screen appears.

Step **Activity View** 9. Select the Add one or Add an Item to the Instructor Authorized Items more from list link, from the Add an Item to the Enter Type and Item ID or add one or more from list **Instructor Authorized** Items section. Caution: Instructors can be scheduled to teach an Item even if they are not authorized to teach that Item. 10. On the > Search screen, Case sensitive search: O Yes

No enter the appropriate Item Types: Starts With search criteria. Item ID: Starts With 💌 Note: See Managing Data Revision Date: Entry and Searches for (MM/DD/YYYY) more detailed information on Revision Number: Starts With searching. Item Title: Starts With Item Status: Active ○ Not Active ○ Both Item Classification Starts With Online Settings: Has online content Domains: Starts With Subject Areas: Starts With 11. Click Search. 12. On the Results tab, Classroom TNG-MSEXCEL-101 (Rev 7/8/2005 01:06 PM EST) Basic Excel locate the desired Item to Classroom THG-MSEXCEL-102 (Rev 10/14/2005 03:21 PM EST) add to the instructor. Classroom THG-MSEXCEL-103 (Rev 10/14/2005 03:23 PM EST) Advanced Excel Select All / Deselect All 13. Select the corresponding Classroom TNG-MSEXCEL-101 (Rev 7/8/2005 01:06 PM EST) Add check box. Classroom TNG-MSEXCEL-102 (Rev 10/14/2005 03:21 PM EST) v Classroom THG-MSEXCEL-103 (Rev 10/14/2005 03:23 PM EST) Advanced Excel Select All / Deselect All

Add

Remove Authorized Items from Instructors

11. Click Apply Changes.

Remind students that complete definitions of terms are included in the glossary.

Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

Inform students that after selecting the Authorized tab, the > Search > Search Results > Edit Authorized to Teach screen appears.

Step **Activity View** 1. Select Learning from the Learning top menu. 2. Select Resources from + Tools + Respurces + Respurces the left menu. 3. Select Instructors. Resources <u>Inptructors</u> Eq.,..pment 4. On the > Search screen, Case sensitive search O Yes 💿 No enter the appropriate Instructor ID: Starts With search criteria. Last Name: Starts With 💌 Note: See Managing Data Entry and Searches for First Name: Starts With 💌 more detailed information on Middle Initial: Starts With searching. Items: Exact V Type: 5. Click Search. Search 6. On the **Results** tab, Instructor ID Instructor Name 🔺 LEARNER04 locate the desired Alec, Learner LEARNER01 Raymond, Learner instructor. 7. Instructor ID Click the **Edit** icon to edit LEARNER04 the instructor information. LEARNER01 8. Click the Authorized to Proctor Status Base Cost Additional Costs Teach tab. Authorized to **Custom Fields** Scheduling Teach From the Update the Update the Authorized Items for the Instructor **Authorized Items for the** Select All / Deselect All Instructor section, locate the Item to be removed. Classroom **TNG-MH-ITEM 2** (Rev 1 11/15/2006 12:00 AM EST) Classroom **TNG-MH-ITEM1** (Rev 2 -11/15/2006 11:15 AM EST) Melz Item 1 10. Select the corresponding Classroom TNG-MH-ITEM 2 (Rev 1 -Melz other great class Remove check box. 11/15/2006 12:00 AM EST) Classroom **TNG-MH-ITEM1** (Rev 2 - 11/15/2006 11:15 AM EST) Melz Item 1

Apply Changes

After introducing the task via the Overview, highlight the roles assigned to perform

each subtask.

Managing a Material Record

Materials are consumable supply Items used during learning (e.g., pens, handouts, giveaways, etc.). Subtasks pertaining to **Managing Locations** are accessible from the **Locations** menu. User-specific subtasks include the following: **View**, **Add**, **Edit**, **Copy**, and **Delete a Location Record**.

A Day-in-the-Life Scenario

As the week begins, you note the following:

- Three classes were held last week. Total student enrollment in these classes was 78.
- A box of supplies that includes 300 three-ring binders has just arrived.

Notes

View a Material Record

menu.

Remind students that complete definitions of terms are included in the glossary.

Step Activity View
1. Select the Learning Learning

- 2. Select **Resources** from the left menu.
- + Tools + Respurces + Res_ences
- 3. Select Materials.

-Equipment -<u>Materials</u> -Pullities

Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

4. On the > Search screen, enter the appropriate search criteria.

> Note: See Managing Data Entry and Searches for more detailed information on searching.

Case sensitive search:

Material ID: Description: ○ Yes ⊙ No Starts With ▼

Starts With

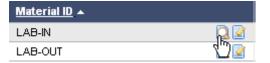
5. Click Search.

Search

6. On the **Results** tab, locate the desired material.

m students that can also view Wiew link to view more information.

7. Click the corresponding View link to view more information.



Inform students that they can also view information about material inventory, base cost, additional costs, and pricing from this screen.

Add a New Material Record

Remind students that complete definitions of terms are included in the glossary.

Remind students that required fields are identified by a red asterisk. Although remaining fields are not required, students should complete as many as they feel are

necessary.

| Step | Activity | View |
|------|--|--|
| 1. | Select the Learning menu. | Learning |
| 2. | Select Resources from the left menu. | + Tools + Respurces + Respurces |
| 3. | Select Materials . | -Equipment - <u>Materials</u> -P ^L mities |
| 4. | Select the Add New link. | Search Adri New Help |
| 5. | Enter the Material ID . | * Material ID: |
| 6. | Enter a material description in the Description field. | Description: |
| 7. | Click the Domain Search icon to search for and enter a domain. | * Domain: PUBLIC |
| 8. | Enter the revision number in the Revision Number field. | Revision Number: |
| 9. | If applicable, enter comments in the Comments field. | Comments: |
| 10. | Click Add. Caution: A Validation Error message will appear if all required fields are not complete. | Add |

Note: For additional information about managing materials, see Managing a Facility Record, Managing a Location Record, Managing Scheduled Offerings, and Managing Segments.

Edit a Material Record

Activity

menu.

Step

1.

Remind students that complete definitions of terms are included in the glossary.

2. Select **Resources** from the left menu.

Select the Learning

3. Select Materials.

Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

4. On the > Search screen, enter the appropriate search criteria.
 Note: See Managing Data Entry and Searches for more detailed information on

searching.

5. Click Search.

On the Results tab, locate the desired material.

7. Click the corresponding **Edit** link to edit material information.

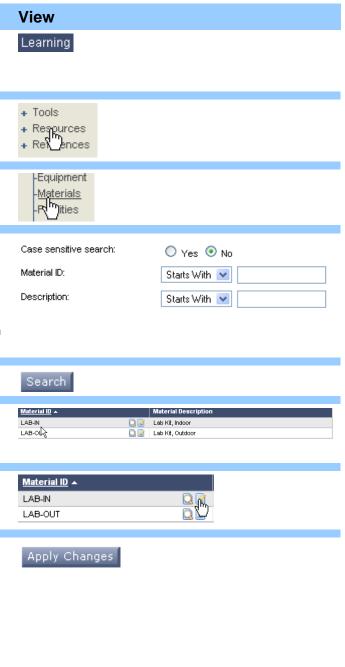
8. Make the appropriate changes and click **Apply Changes**.

Caution: Do not select a different tab prior to clicking **Apply Changes** or all changes and modifications will be lost.

Click the Inventory tab.

Inform students to make all necessary changes using the tabs available. However, caution them to click **Apply Changes** before selecting a different tab. Otherwise they will lose all their changes and

modifications.



Inventory

Base Cost

Summary

Edit a Material Record

10. Make the appropriate changes and click Apply Changes. Note: Materials associated with a facility appear in the Update the Inventory for the Materials section. Tip: Click the corresponding Remove check box to remove material from a facility.

Copy a Material Record

Activity

Step

1.

Remind students that complete definitions of terms are included in the glossary.

menu.

Learning

View

2. Select **Resources** from the left menu.

Select the Learning

+ Tools
+ Respurces
+ Respurces

3. Select Materials.



Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

4. On the > Search screen, enter the appropriate search criteria.

Note: See Managing Data Entry and Searches for more detailed information on searching. Case sensitive search:

Material ID:

Description:



5. Click Search.

Search

6. On the Results tab, locate the desired material.

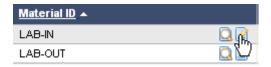


Material Description

Lab Kit, Indoor

Lab Kit, Outdoor

7. Select the corresponding **Edit** icon.



8. Click Copy Material.

Copy Material...

 Enter the material ID of the newly copied material record in the New Material ID field.



 Select the check boxes of the material record elements you want to copy.

| _ | | |
|---|------|------|
| | Copy | Iten |

Copy Scheduled Offering

Copy Facility

11. Click Copy.

Сору

Copy a Material Record

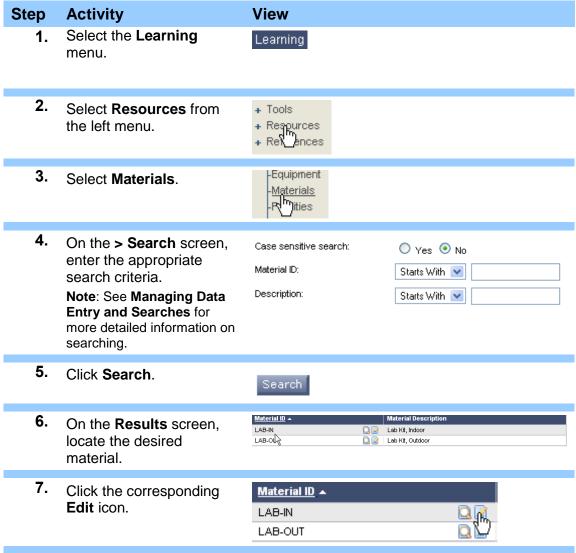
Step Activity View

Delete a Material Record

Remind students that terms are included in the glossary.

complete definitions of

Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.



Delete

9. Click OK in the Confirmation box.

Click Delete.

8.

Caution: Be certain that the material selected should be deleted. If unsure, click Cancel.



After introducing the task via the Overview, highlight the roles assigned to perform

each subtask.

Managing Equipment

AgLearn defines Equipment as a reusable physical resource needed for the delivery of training (e.g., overhead projectors, television monitors, VCR players, etc.). Subtasks pertaining to **Managing Equipment** are accessible from the **Equipment** menu. User-specific subtasks include the following: **View**, **Add**, **Edit**, **Copy**, and **Delete an Equipment Record**.

A Day-in-the-Life Scenario

Equipment Records at your facility need to be updated. You need to:

- Add a new VCR
- Delete an Overhead Projector
- Indicate that the 25-inch Video Monitor is unavailable due to maintenance

Notes

View an Equipment Record

Remind students that complete definitions of terms are included in the glossary.

Step **Activity** View 1. Select the Learning Learning menu. 2. Select Resources from + Tools + Respurces + Respurces the left menu. 3. -Instructors Select Equipment. <u>Eflyipment</u> Merials On the > Search screen, Case sensitive search: Yes
No enter the appropriate Equipment ID: search criteria. Starts With Note: See Managing Data Description: Starts With Entry and Searches for more detailed information on searching. 5. Click Search. Search 6. On the **Results** tab. ☐ FLIP CHARTS locate the desired LCD Projector equipment. Click the corresponding View link to view more LCD Projecto information.

Students can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

Inform students that they can also view scheduled offerings for the equipment from the **Offerings** tab on this screen.

Add a New Equipment Record

Remind students that complete definitions of terms are included in the glossary.

Remind students that required fields are identified by a red asterisk. Although remaining fields are not required, students should complete as many as they feel are necessary.

| Step | Activity | View | |
|------|---|---|--|
| 1. | Select the Learning menu. | Learning | |
| 2. | Select Resources from the left menu. | + Tools + Resources + Resources | |
| 3. | Select Equipment . | -Instructors - <u>Eqhipment</u> -M a.e rials | |
| 4. | Select the Add New link. | Search Ad ri N ew | Help |
| 5. | Enter the Equipment ID . | * Equipment ID: | |
| 6. | Enter an equipment description in the Description field. | Description: | |
| 7. | Click the Domain Search icon to search for and enter a domain. | * Domain: | PUBLIC |
| 8. | Enter a serial number in the Serial Number field. | Serial Number: | |
| 9. | Click the Equipment Type Selection icon to search for and enter an equipment type. | Equipment Type: | |
| 10. | Click the Equipment Status Selection icon to search for and enter an equipment status. | Equipment Status: | |
| 11. | Click the Assigned Location Selection icon to search for and enter an assigned location. | Assigned Location: | KitCarsonCR (Large first floor Conference Facility) LP-1 (Livestock Pen 1) Newtown Square Park Center (3101 Park Center Dr., Suite 1100, AlexVA) Rm. 197 South (It is a room with a view.) |

Add a New Equipment Record

| | Step | Activity | View | |
|--|------|---|-----------|--|
| | 12. | Click the Facility Selection icon to search for and enter a facility. | Facility: | Regional Office (Main FS office) SOUTH (South Building) South Building (South Building) WHIT (Whitten Building) fs-candle (newer facility) |
| | 13. | Enter a contact name in the Contact field. | Contact: | |
| Inform students they can use this field to enter free-form comments. | 14. | If applicable, enter comments in the Comments field. | Comments: | <u>~</u> |
| | 15. | Click Add . Caution : A Validation Error message will appear if all required fields are not complete. | Add | |
| | | | | |

Note: For additional information about managing equipment, see Managing a Facility Record, Managing a Location Record, Managing Scheduled Offerings, and Managing Segments.

Edit an Equipment Record

Remind students that complete definitions of terms are included in the glossary.

1. Select the Learning menu.

Activity

Step

2. Select Resources from the left menu.

3. Select Equipment.

Students can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

4. On the > Search screen, enter the appropriate search criteria.

> Note: See Managing Data Entry and Searches for more detailed information on searching.

5. Click Search.

6. On the Results screen, locate the desired equipment.

7. Click the corresponding Edit icon to edit equipment information.

8. Make the appropriate changes and click Apply Changes.

> Caution: Do not select a different tab prior to clicking Apply Changes or else all changes and modifications will be lost.

9. Click the Offerings tab to view the Scheduled Offerings for the equipment.

Apply Changes

View

Learning

+ Tools

+ Resources + Res_ences

-Instructors

<u>Equipment</u> Macerials

Equipment ID:

Description:

Search

FS11111

Projector

Projector

Case sensitive search:

Inform students to make all necessary changes using the tabs available. However. caution them to click Apply Changes before selecting a different tab. Otherwise they will lose all their changes and modifications.

Summary Offerings Base Cost

O Yes

No

Starts With

Starts With

LCD Projector

FLIP CHARTS

LCD Projector

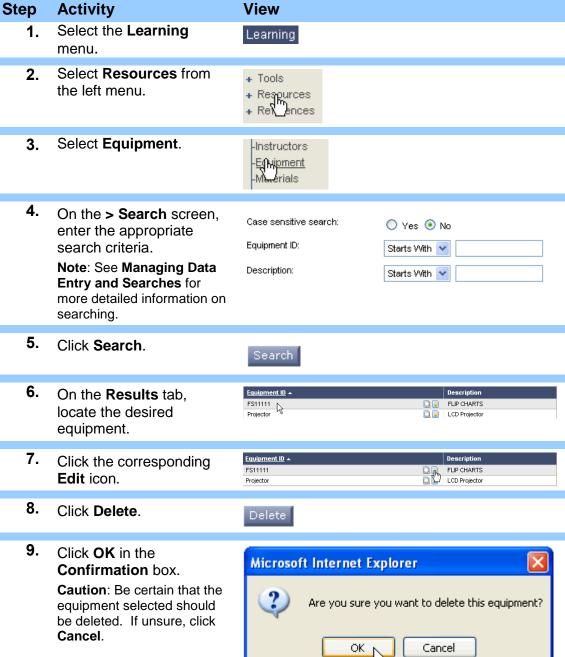
Note: For additional information about editing equipment associated with a Scheduled Offering, see Managing Scheduled Offerings and Managing Segments.

Delete an Equipment Record

Remind students that complete definitions of terms are included in the glossary.

menu. 2.

Students can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.



Copy an Equipment Record

Remind students that complete definitions of terms are included in the glossary.

Select the Learning menu.

Activity

Step

Learning

View

2. Select **Resources** from the left menu.

+ Tools + Resources + Resources

3. Select Equipment.

-Instructors -Equipment -Ma-erials

Students can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

4. On the > Search screen, enter the appropriate search criteria.

> Note: See Managing Data Entry and Searches for more detailed information on searching.

Case sensitive search:

Equipment ID:

O Yes 💿 No

Starts With Starts With

FLIP CHARTS

LCD Projector

5. Click Search.

Search

Description:

6. On the **Results** screen, locate the desired equipment.

..,

 Equipment ID ►
 Description

 FS11111 Projector
 □ □ □ FLIP CHARTS

 Projector
 □ □ □ LCD Projector

7. Select the corresponding **Edit** icon.

Equipment ID. ▲ FS11111 Projector

8. Click Copy Equipment....

Copy Equipment...

9. Enter the new Equipment ID.

New Equipment ID:

10. If applicable, select the Copy scheduled offering relationships check box.

Copy scheduled offering relationships

11. Click Copy.

Сору

After introducing the task via the Overview, highlight the roles assigned to perform each subtask.

Managing a Location Record

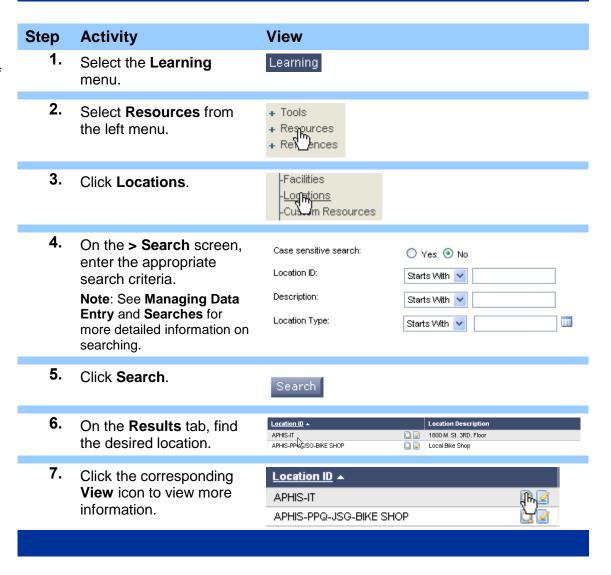
A location is a specific place within a facility where an offering (or a segment within an offering) is delivered. Locations can be anything from classrooms and simulators to barns and fields. Subtasks pertaining to **Managing Locations** are accessible from the **Locations** menu. User-specific subtasks include the following: **View**, **Add**, **Edit**, **Copy**, and **Delete a Location Record**.

A Day-in-the-Life Scenario

Two small classrooms at your facility have recently been renovated to create one large conference room that can hold up to 50 people.

Notes

View a Location Record



Add a New Location Record

Select the Learning

Scheduling an Activity for a location resource, reserves the resource even if the activity is not training related.

Remind students that

terms are included in

the glossary.

complete definitions of

menu. 2. Select Resources from the left menu.

Activity

Step

1.

3. Select Locations.

4. Select the Add New link.

5. Enter the Location ID.

> Note: Check with your agency lead for the naming standard.

* Location ID:

View

Learning

+ Tools

+ Resources + Res_ences

-Facilities

<u>Logations</u> -Cus...m Resources

Search | Adrl New | Help |

6. Enter a location description in the **Description** field.

Inform students that required fields are identified by a red asterisk. Encourage students to capture as much information as possible in remaining fields.

7. Click the **Domain** Selection icon to search for and enter a domain.

* Domain:

Description:

PUBLIC

8. Click the Location Type Selection icon to search for and enter a location type.

Location Type:

9. Click the Facility selection icon to search for and enter a facility.

SOUTH (South Building) South Building (South Building) WHIT (Whitten Building) fs-candle (newer facility)

Regional Office (Main FS office)

10. Enter the maximum capacity for registration in the Max Capacity field.

Max Capacity: (1000,001)

Facility:

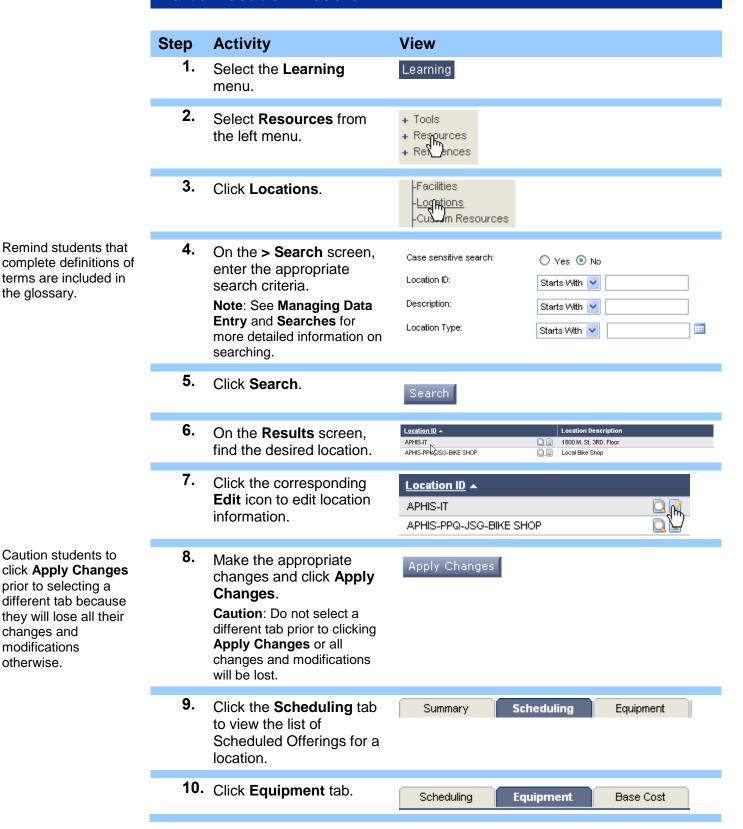
Add a New Location Record

The contact name should be the name of the person responsible for this location. It may be the same name as the facility, or it may be someone specifically identified for this location.

An association between facility and location can be made using the Add from List link in the Add Facility section. An association can also be made in the location record.

| Step | Activity | View | |
|------|--|----------------|----------|
| 11. | Enter a contact name in the Contact Name field. | Contact Name: | |
| 12. | Enter the contact's e-mail address in the Contact Email field. | Contact Email: | |
| 13. | Enter comments as appropriate. | Comments: | <u>^</u> |
| 14. | Click Add. Caution: A Validation Error message will appear if all required fields are not complete. | Add | |

Edit a Location Record

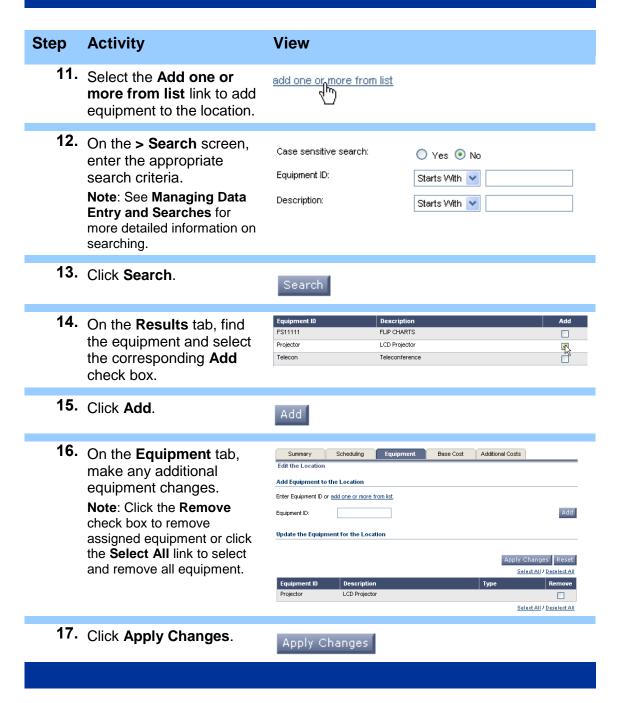


Caution students to click Apply Changes prior to selecting a different tab because they will lose all their changes and modifications

otherwise.

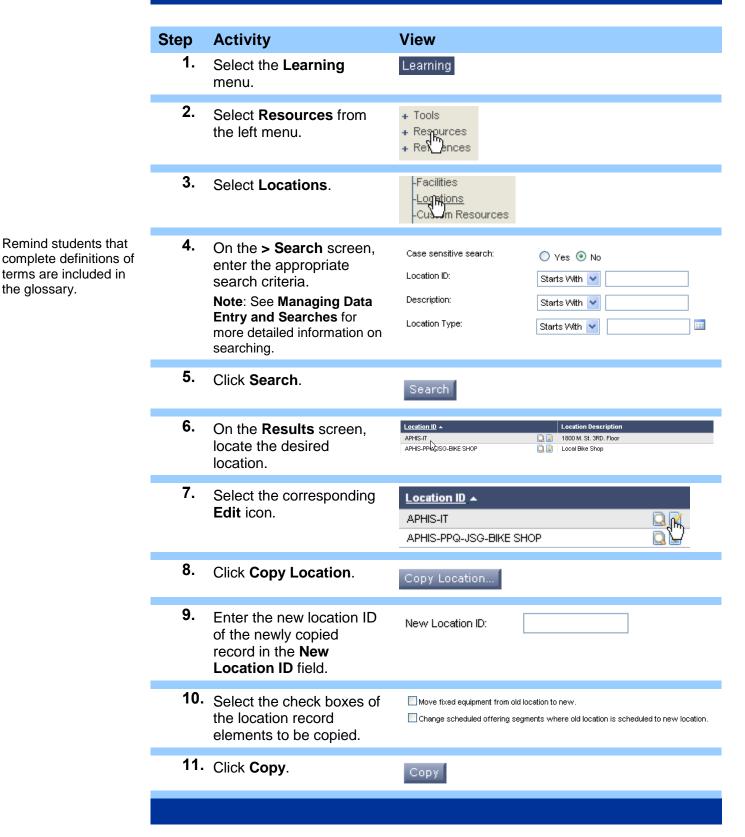
the glossary.

Edit a Location Record



the glossary.

Copy a Location Record



the glossary.

Delete a Location Record



After introducing the task via the Overview, highlight the roles assigned to perform each subtask.

Managing A Work Week Profile

Work weeks are those days of the week when learning can be scheduled at a facility, and are defined through the creation of work week profiles. Profiles prevent offerings from being scheduled on a day of the week that has been excluded from the work week. Tasks pertaining to work week profiles are accessible from the **Resources** menu. Work week profile specific tasks include the following: **View**, **Add**, **Edit**, and **Delete a work week profile record**.

A Day-in-the-Life Scenario

A facility needs to be available seven days a week to accommodate staff needs.

Notes

View A Work Week Profile Record

| Step | Activity | View |
|------|--|--|
| 1. | Select the Learning menu. | Learning |
| 2. | Select References from the left menu. | + Resources + References |
| 3. | Select Work Week Profiles. | -Training VendorsWork Week Profiles |
| 4. | On the > Search screen, enter the appropriate search criteria. Note: See Managing Data Entry and Searches for more detailed information on searching. | Work Week Profile ID: Starts With Description: Starts With |
| 5. | Click Search . | Search |
| 6. | On the Results tab, locate the desired profile. | Work Week Profile ID ▲ Description Mon-Fri |
| 7. | Click the corresponding View link to view the profile's Summary tab information. | Work Week Profile ID ▲ Mon-Fri |
| | | |

Add A Work Week Profile Record

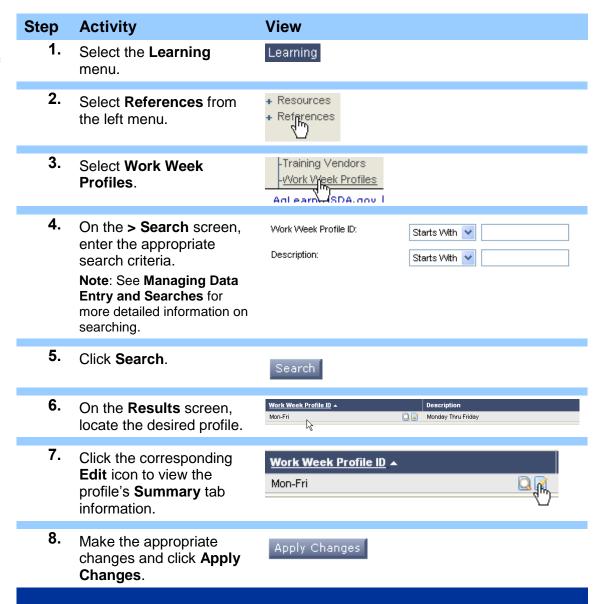
Remind students that complete definitions of terms are included in the glossary.

Remind students that required fields are identified by a red asterisk. Although remaining fields are not required, students should complete as many as they feel are necessary.

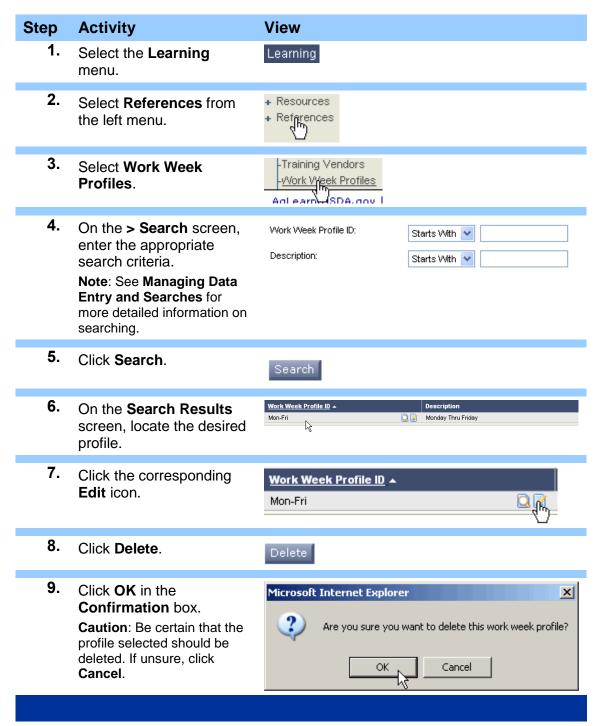
Inform students that the naming convention for a Work Week ID is LLL-Description (30 character maximum).

| Step | Activity | View |
|------|--|--|
| 1. | Select the Learning menu. | Learning |
| 2. | Select References from the left menu. | + Resources + References |
| 3. | Select Work Week Profiles. | -Training VendorsWork Week ProfilesAgl earnSDA.gov I |
| 4. | Select the Add New link. | Search [Add New Help |
| 5. | Enter the Work Week ID . | * Work Week ID: |
| 6. | Enter a Description . | Description: |
| 7. | Select the check boxes of | Sunday: |
| | the days of the week on which training offerings may be scheduled. | Monday: |
| | | Tuesday: ✓ |
| | | Wednesday: |
| | | Thursday: |
| | | Friday: |
| | | Saturday: |
| 8. | Click Add. | Add |

Edit A Work Week Profile Record



Delete A Work Week Profile Record



After introducing the task via the Overview, highlight the roles assigned to perform each subtask.

Managing Holiday Profiles

Holiday Profiles are used to define the holidays for training facilities. The list of holidays included in the profile can be used for a single facility or assigned to multiple facilities. Once a facility has been assigned a holiday profile, offerings can not be scheduled for holidays included in the profile.

The tasks for Managing Holiday Profiles include: View, Add, Edit, and Delete a Holiday Profile, Add a Holiday to a Holiday Profile, and Remove a Holiday from a Holiday Profile.

A Day-in-the-Life Scenario

The current facility holiday profile does not include Columbus Day. Add the Columbus Day holiday to the facility profile. You'll need to:

- Search for the current Holiday Profile
- Add Columbus Day to the profile

Notes

View a Holiday Profile

| Step | Activity | View |
|------|--|--|
| 1. | Select the Learning menu. | Learning |
| 2. | Select References from the left menu. | + Resources + References |
| 3. | Select Holiday Profiles. | -Equipment Types -Holighy Profiles -Item sources |
| 4. | On the > Search screen, enter the appropriate search criteria. Note: See Managing Data Entry and Searches for more detailed information on searching. | Holiday Profile ID: Starts With Description: Starts With |
| 5. | Click Search . | Search |

View a Holiday Profile

Step **Activity View** 6. On the Results screen, Region 8 RO 11 Federal Holidays locate the desired holiday Federal Holidays profile. 7. Click the corresponding Holiday Profile ID 🔺 View icon to view the FS-R8 holiday profile Federal Holidays information. 8. Click the **Holidays** tab to Summary Holidays view the list of holidays associated with this profile.

Add a Holiday Profile

Remind students that complete definitions of terms are included in the glossary.

Inform students that the

naming convention for

Holiday Profile IDs is "LLL-Description" (30 character maximum). Step **Activity View** 1. Select the Learning Learning menu. 2. + Resources Select References from + References the left menu. Equipment Types 3. Select Holiday Profiles. -Holighҗ Profiles Item Sources 4. Select the Add New link. Search | Adrl New | Help | Enter the Holiday Profile * Holiday Profile ID: ID. 6. Enter a **Description**. Description: 7. Click Add. Add 8. Click the **Holidays** tab to Holidays Summary view the Edit Holidays screen. Note: At this point, there are no holidays associated with this profile. See Add a Holiday to a Holiday **Profile** for more information. 9. Select the Add one or Add a Holiday to the Holiday Profile

more from list link.

Enter Holiday ID or add one or more from list Holiday ID:

10. Select the Add check box next to each holiday to be added.

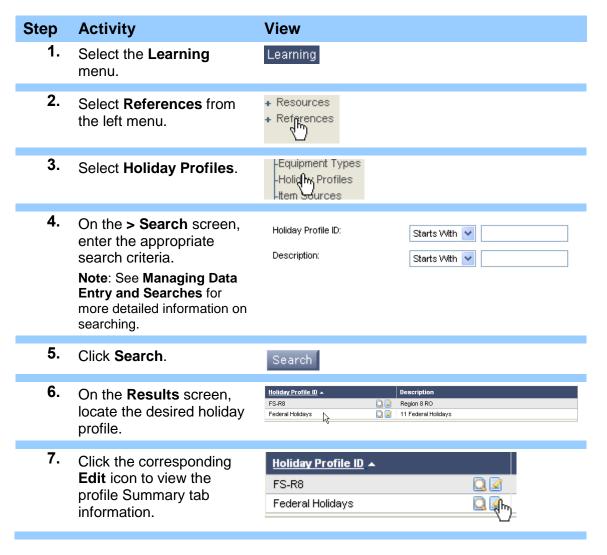


11. Click Add.

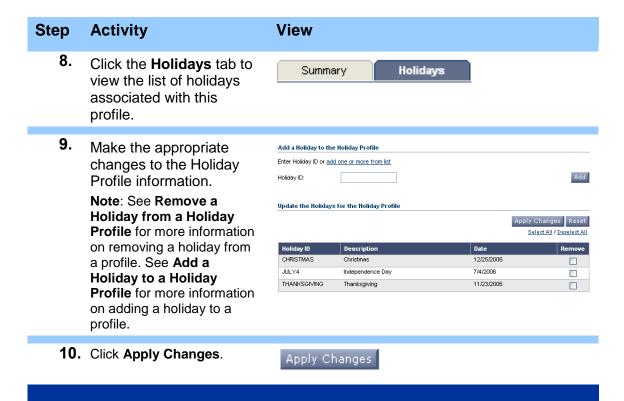


Edit a Holiday Profile

Remind students that complete definitions of terms are included in the glossary.

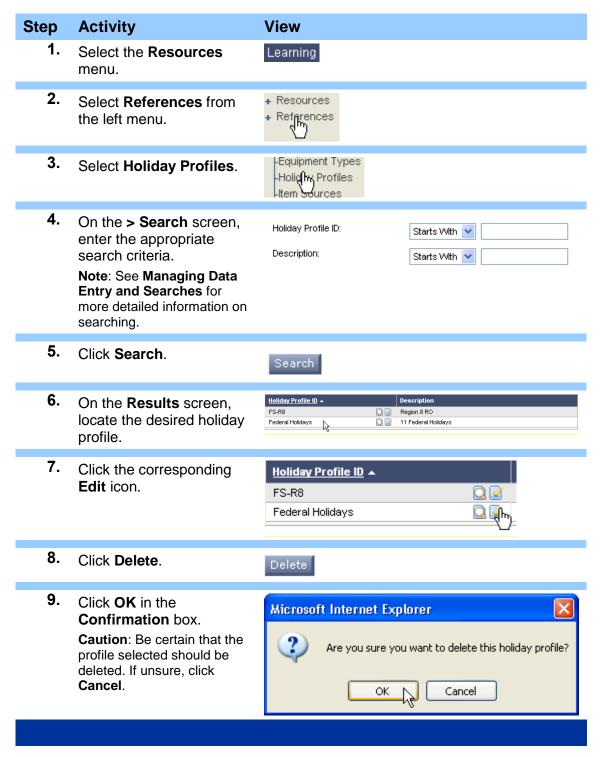


Edit a Holiday Profile



Delete a Holiday Profile

Remind students that complete definitions of terms are included in the glossary.



Add a Holiday to a Holiday Profile

Remind students that complete definitions of terms are included in the glossary.

Step **Activity View** 1. Select the Learning Learning menu. 2. + Resources Select References from + References the left menu. -Equipment Types 3. Select Holiday Profiles. -Holighҗ Profiles Item Sources 4. On the > Search screen, Holiday Profile ID: Starts With enter the appropriate Description: search criteria. Starts With Note: See Managing Data Entry and Searches for more detailed information on searching. 5. Click Search. Search 6. On the **Results** tab. locate the desired holiday Federal Holidays 11 Federal Holidays profile. 7. Click the corresponding Holiday Profile ID A Edit link. FS-R8 🚨 🗐 հու Federal Holidays 8. Click the **Holidays** tab. Holidays Summary

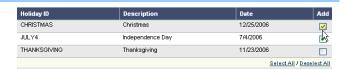
After selecting the Holidays tab, > Search > Search Results > Edit Holidays screen appears.

9. In the Add a Holiday to the Holiday Profile section, select Add one or more from list.

Add a Holiday to the Holiday Profile

Enter Holiday ID or add one or more from list

 On the > Search Results screen, locate the desired holiday to add the profile and select the corresponding Add check box.

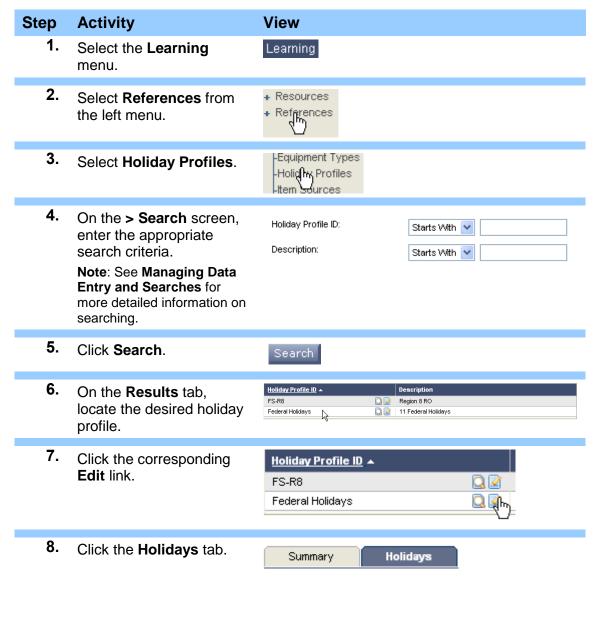


Add a Holiday to a Holiday Profile

| Step | Activity | View |
|------|------------|------|
| 11. | Click Add. | bbA |
| | | |

Remove a Holiday from a Holiday Profile

Remind students that complete definitions of terms are included in the glossary.



Inform students that after selecting the Authorized tab, the > Search > Search Results > Edit Holidays screen appears.

- 9. In the Update the Holidays for the Holiday Profile section, locate the holiday to be removed.
- 10. Select the corresponding Remove check box.

| Holiday ID | Description | Date | Remove |
|--------------|------------------|------------|--------|
| CHRISTMAS | Christmas | 12/25/2006 | |
| JULY4 | Independence Day | 7/4/2006 | R |
| THANKSGIVING | Thanksgiving | 11/23/2006 | Ľ. |

11. Click Apply Changes.

Apply Changes

Remove a Holiday from a Holiday Profile

Step Activity View

After introducing the task via the Overview, highlight the roles assigned to perform each subtask.

Managing a Facility Record

A facility can be a building (Whitten) or a complex (BARC); its purpose is to provide a logical grouping of "locations" where training takes place. (Locations will be discussed below.) Subtasks pertaining to **Managing Facilities** are accessible from the **Resources** menu. Facility-specific subtasks include the following: **View**, **Add**, **Edit**, **Copy**, and **Delete a Facility Record**.

A Day-in-the-Life Scenario

A new training facility has recently become available for use by your agency. The facility is located approximately 2 blocks from the South Building, and includes six classrooms. Although no equipment is currently located in the new classrooms, you have been authorized to transfer a portion of the equipment that is assigned to your current facility.

Notes

View a Facility Record

On the **Results** screen, locate the desired facility.

Select the corresponding

View icon to view more

information.

7.

Currently, no automatic scripts have been created to add facilities. It is recommended that Domain Managers add facilities manually rather than import them from existing databases.

Remind students that complete definitions of terms are included in the glossary.

Remind students that **Facilities** is the default screen for the **Resources** section.

| Step | Activity | View | |
|------|--|--|--------------------------|
| 1. | Select the Learning menu. | Learning | |
| _ | | | |
| 2. | Select Resources from the left menu. | + Tools + Respurces + Respurces | |
| 3. | Select Facilities . | -Materials - <u>Facilities</u> -Loc ^M ons | |
| | | | |
| 4. | On the > Search screen, enter the appropriate search criteria. Note: See Managing Data Entry and Searches for more detailed information on searching. | Facility ID: Description: | Starts With Starts With |
| 5. | Click Search . | Search | |

Facility ID 🔺

Facility ID A

FNS05

FS Tori

FS Tori

Forest Service Training Facility

Add a New Facility Record

Inform students that Facilities is the default screen for the Resources section.

View

Select the Learning menu.

Activity

Step

4.

Learning

2. Select Resources from the left menu.



3. Select Facilities. -Materials -<u>Facilities</u> -Lo&__bns

Remind students that complete definitions of terms are included in the glossary.

Select the Add New link.



Tell students that the naming convention for Facility IDs is "LLL-Description" (30 character maximum).

Enter the Facility ID.

* Facility ID:

Inform students that the naming convention for Facility descriptions is "LLL-Description" (30 character maximum).

Enter a facility description in the **Description** field. Tip: Enter an easily recognizable name for the facility in the **Description** field.

* Description:

Remind students that required fields are identified by a red asterisk. Although remaining fields are not required, students should complete as many as they feel are necessary.

7. Click the **Domain** Search icon to search for and enter a domain.

* Domain:

🤼 PUBLIC

Tell students that VA is not using Region as an organizational structure for the AgLearn prototype.

8. Click the Region Selection icon to search for and enter a region.

Region:

APHISER (APHIS Eastern Region [Raleigh NC]) APHISWR (APHIS Western Region [Fort Collins]) ERO (NAD-Eastern Regional Office, Indianapolis) FS-R1 (Region One)

Click the Holiday Profile Selection icon to search for and enter a holiday profile.

Holiday Profile:

FS-R8 (Region 8 RO) Federal Holidays (11 Federal Holidays) Test

10. Click the Time Zone Selection icon to search for and enter a time zone.

Time Zone:

EST (Eastern Standard Time)

Once a new record is submitted, the **Search Results > Edit Summary** screen appears. From this screen, students can add contacts, locations,

equipment, and materials to a facility. Remind students that it is important to enter POC information for a

facility.

Add a New Facility Record

| Step | Activity | View | |
|------|--|---|------------------------------|
| 11. | Click the Work Week Selection icon to search for and enter a work week profile. | Work Week: | Mon-Fri (Monday Thru Friday) |
| 12. | If applicable, select the External Facility check box. | External Facility: | The second second |
| 13. | If applicable, enter comments in the Comments field. | Comments: | |
| 14. | Click Add . Caution : A Validation Error message will appear if all required fields are not complete. | Add | |
| 15. | Click the Contact tab. | Summary | Contact Locations |
| 16. | Enter information about the facility's contact person in the appropriate fields. | Contact: Address: City: State / Province: Postal Code: Country: Phone Number: Fax Number: Email Address: | |
| 17. | Select Apply Changes. Note: See Edit a Facility Record to view information on adding locations, equipment, and materials to a facility. | Apply Changes | |

Edit a Facility Record

menu.

Remind students that complete definitions of terms are included in the glossary.

Step Activity View
1. Select the Learning Learning

2. Select **Resources** from the left menu.

+ Tools + Resources + Resources

3. Select Facilities.



Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

4. On the > Search screen, enter the appropriate search criteria.

> Note: See Managing Data Entry and Searches for more detailed information on searching.

Facility ID: Description: Starts With
Starts With

5. Click Search.

Search

6. On the **Results** screen, locate the desired facility.

| Facility ID ▲ | Facility Description |
|---------------|----------------------------------|
| FNS05 | Southwest Region |
| FS Tori | Forest Service Training Facility |
| | |

7. Select the corresponding **Edit** icon to edit facility information.



FNS05
FS Tori

Tell students to make all necessary changes using the tabs available. However, caution them to click **Apply Changes** before selecting a different tab or they will lose all their changes and modifications.

Make the appropriate changes and click **Apply Changes**.

Caution: Do not select a different tab prior to clicking Apply Changes or all changes and modifications will be lost. Apply Changes

9. Click the Contact tab.

Summary Contact Locations

10. Make the appropriate changes and click **Apply Changes**.

Apply Changes

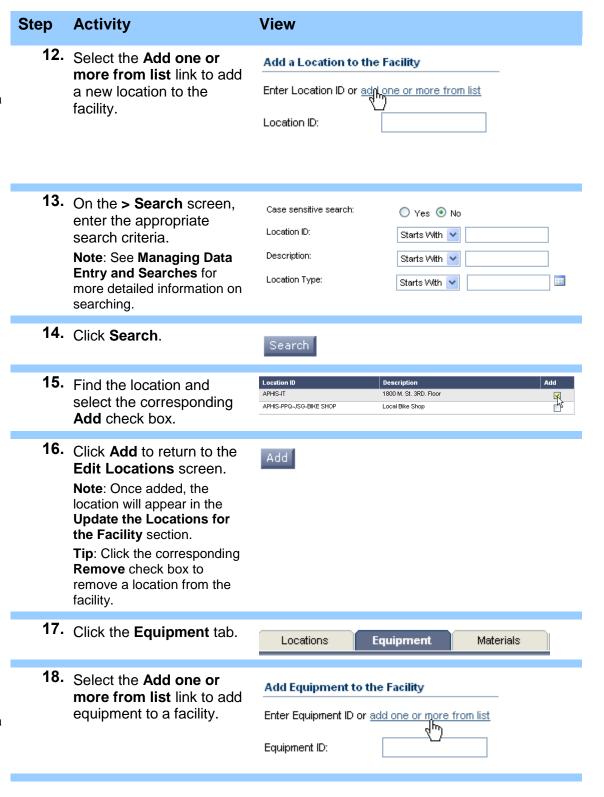
11. Click the Locations tab.

Contact Locations Equipment

Edit a Facility Record

If the Location ID is known, students can enter it directly and click **Add**. (It is an extra step to select it from the list, but possibly easier, since the Location ID may be difficult to memorize.)

Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.



If the Equipment ID is known, students can enter it directly and click **Add**. (It is an extra step to select it from the list, but possibly

Edit a Facility Record

easier, since the Equipment ID may be difficult to memorize.) Inform students that Equipment IDs are auto-generated.

Step **Activity** View 19. On the > Search screen, Case sensitive search: Yes
No enter the appropriate Equipment ID: search criteria. Starts With Note: See Managing Data Description: Starts With Entry and Searches for more detailed information on searching. 20. Click Search. Search **21.** Find the equipment and select the corresponding LCD Projector Add check box. Telecon Teleconference 22. Click Add to return to the Add Edit Equipment screen. Note: Once added, the equipment will appear in the **Update the Equipment for** the Facility section. Tip: Click the corresponding Remove check box to remove equipment from the facility. 23. Click the Materials tab. Materials Equipment Base Cost 24. Select the Add one or Add Material to the Facility more from list link to add materials to a facility. Enter Material ID or add pine or more from list Material ID: 25. On the > Search screen, Case sensitive search:

Search

Inform students that materials refer to consumable supply items that are used during learning, such as pens, handouts, giveaways, etc.

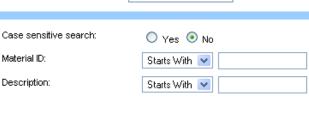
Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

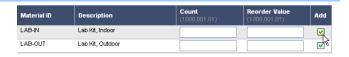
25. On the **> Search** screen, enter the appropriate search criteria.

Note: See Managing Data Entry and Searches for more detailed information on searching.

26. Click Search.

27. Find the material and select the corresponding Add check box.





Edit a Facility Record

| Step | Activity | View |
|------|--|--|
| 28. | Enter appropriate information in Count and Reorder Value fields (optional). | Count: (1000,001.01) Reorder Value: (1000,001.01) |
| | | |
| 29. | Click Add to return to the Edit Facility screen. Note: Once added, the material will appear in the Update the Materials for the Facility section. | Add |
| | Tip : Click the corresponding Remove check box to remove material from the facility. | |
| | | |

complete definitions of terms are included in the glossary.

Inform students that they can perform either a Simple or **Advanced Search** depending upon the level of detail they need for their search.

Inform students that they can copy equipment, location, and scheduled offering relationships as well as material inventories.

Copy a Facility Record **Activity View** Step Remind students that 1. Select the **Learning** Learning menu. 2. Select Resources from + Tools + Respurces + Respurces the left menu. 3. -Materials Select Facilities. -<u>Facilities</u> -Lo& bns 4. On the > Search screen, Facility ID: Starts With 💌 enter the appropriate Description: Starts With search criteria. **Note:** See Managing Data Entry and Searches for more detailed information on searching. 5. Click Search. Search 6. On the Results screen, FS Tori locate the desired facility. Forest Service Training Facility 7. Select the corresponding Facility ID . Edit icon. **FNS05** FS Tori 8. Click Copy Facility.... Copy Facility... 9. Enter the facility ID of the New Facility ID: newly copied record in the New Facility ID field. 10. Select the check boxes of Update equipment relationships the facility record Update location relationships elements you want to Update scheduled offering relationships copy. Copy material inventory 11. Click Copy. Сору

Delete a Facility Record

Remind students that complete definitions of terms are included in the glossary.

1. Select the **Learning** menu.

Activity

Step

View Learning

2. Select **Resources** from the left menu.



3. Select Facilities.



Inform students that they can perform either a Simple or Advanced Search depending upon the level of detail they need for their search.

 On the > Search screen, enter the appropriate search criteria.

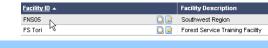
> Note: See Managing Data Entry and Searches for more detailed information on searching.

Facility ID: Description: Starts With V

5. Click Search.



6. On the **Results** screen, locate the desired facility.



7. Select the corresponding **Edit** icon.

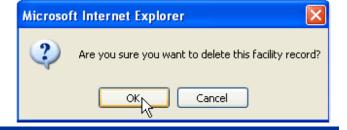


8. Click Delete.



9. Click **OK** in the Confirmation box.

Caution: Be certain that the facility record selected should be deleted. If unsure, click **Cancel**.



Managing Training Approval Processes

AgLearn has the ability to manage multiple multi-level training approval processes. The creation of additional approval mechanisms and roles will be handled at a higher level; agency administrators will assign Users to approval roles and associate specific Approval Processes with Items and Scheduled offerings.

An approval process may have as many as six steps, though six-step approvals will be rare. A User's two immediate supervisors are automatically set up in the system to fill two default approval roles; many Items may only require a supervisor approval.

For more complicated processes, seven other roles have been created. This grants each agency the flexibility to use the processes best suited to their needs, and appropriate for each Item. Approval Roles such as Budget, Training Coordinator, and Training Officer can be mapped to specific individuals if those titles exist in your agency. More generic roles (Approver 1, Approver 2, Reviewer, and Final Approver) have been created for processes that need more flexibility in the selection of personnel to fill each role.

A Day-in-the-Life Scenario

It has been decided that Users should get their supervisor and Budget Officer to approve a specific Item before registration is permitted. You must assign a User to the role of Budget Officer and modify the Item record to reflect this new policy.

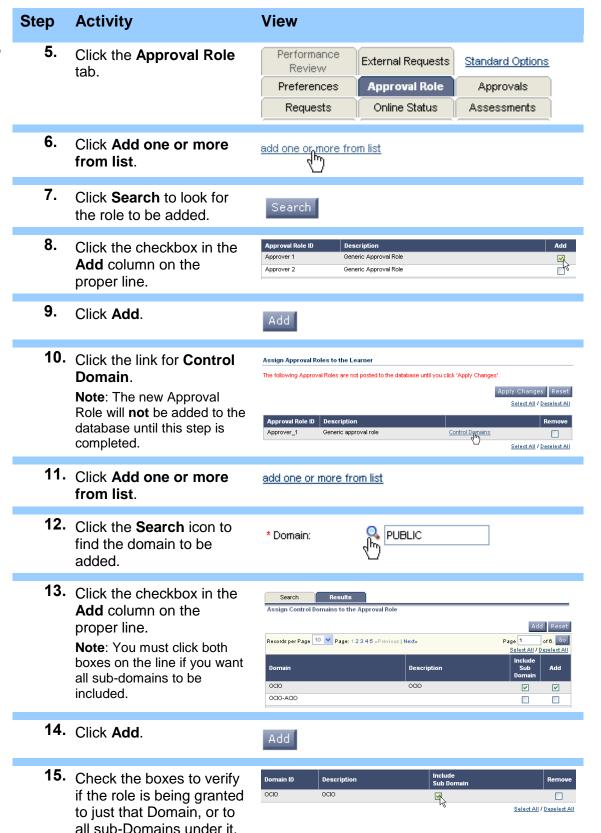
Notes

Assign an Approval Role to a User

Step **Activity** View 1. Select User User Management Management from the top menu. 2. Search for the User for Enter a value for each field that you want to use to filter your search. Some fields allow you to select from a list of whom you wish to add or values. You can also add or remove search criteria to further refine your search change an Approval Role. Case sensitive search: O yes No Starts With Last Name: Starts With Starts With Middle Initial Starts With User Status Starts With 3. Locate the User on the User ID User Name LEARNERO4 🔾 📝 🛘 Learner, Ale TRAINING LEARNERO? Results screen. Q Learner, Bill LEARNER05 TRAINING LEARNER04 Click the corresponding <u>User ID</u> <u>User Name</u> Edit icon. LEARNER04 Learner, Alec LEARNER05 Learner, Bill

Assign an Approval Role to a User

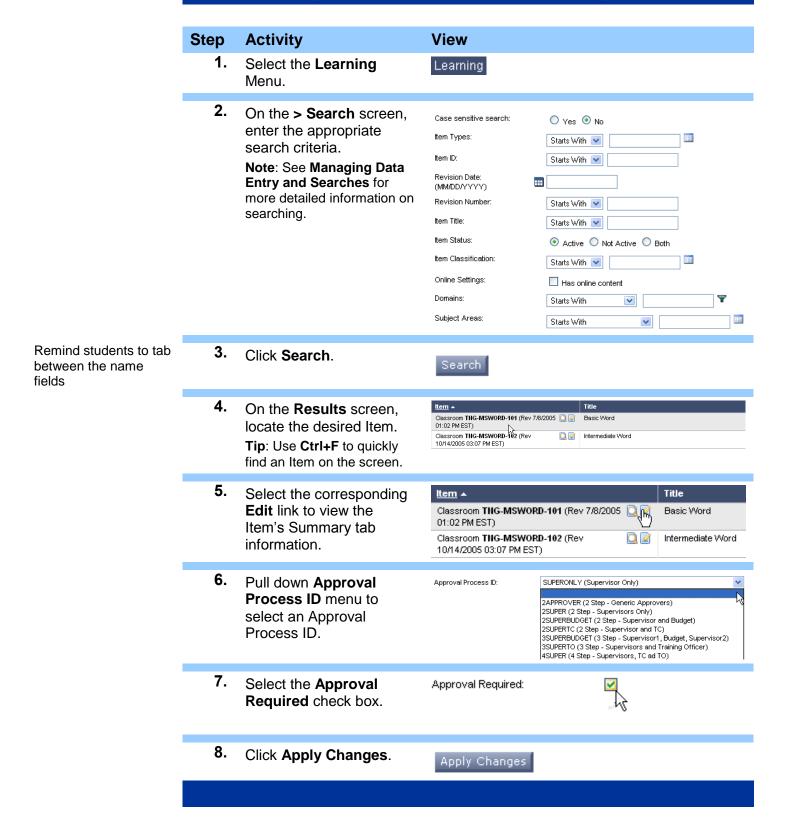
Remind students to tab between the name fields



Assign an Approval Role to a User

| Step | Activity | View |
|------|---|-------------------------|
| 16. | Click Submit . | Submit |
| 17. | Click Return to Approval Role. | Return to Approval Role |
| 18. | Click Apply Changes . Note : Modifications to the User's Approval Roles are not posted to the database until you click Apply Changes . | Apply Changes |

Add a Training Approval Process to an Existing Item



Managing Communities

AgLearn enables you to conduct asynchronous, threaded discussions through online communities. Each Community contains one or more topics; the individual topics are composed of multiple messages. Users are then free to read or post messages at their convenience.

Communities in AgLearn are created by administrators and managed by moderators. The administrator functions, including assigning a moderator to the community, are performed from AgLearn Administration. The moderator - who is a User - performs his or her community functions through the User Interface.

A Day-in-the-Life Scenario

A General Community is to be created for AgLearn administrators to exchange ideas. Moderators must be assigned to manage this community.

Notes

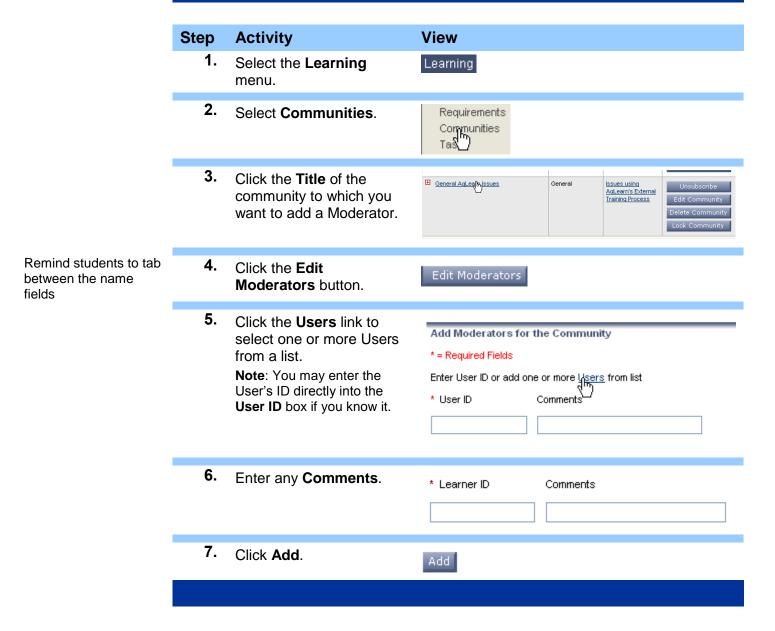
Create a General Community

| | Step | Activity | View |
|--|------|--|--|
| | 1. | Select the Learning menu. | Learning |
| | 2. | Select Communities . | Requirements Communities Tas |
| | 3. | Click Add New . | Search Subscribed View All Add New Help |
| Remind students to tab between the name fields | 4. | Select the Community Type: General . | Select Community Type |
| | | | ெltern C Scheduled Offering 🧣 General |
| | 5. | Click Next . | Next |
| | 6. | Enter a Community Title . Note : This is a required field. | Enter General Community Information * = Required Fields * Community Title: |
| | 7. | Enter a Community Description . | Community Description: |

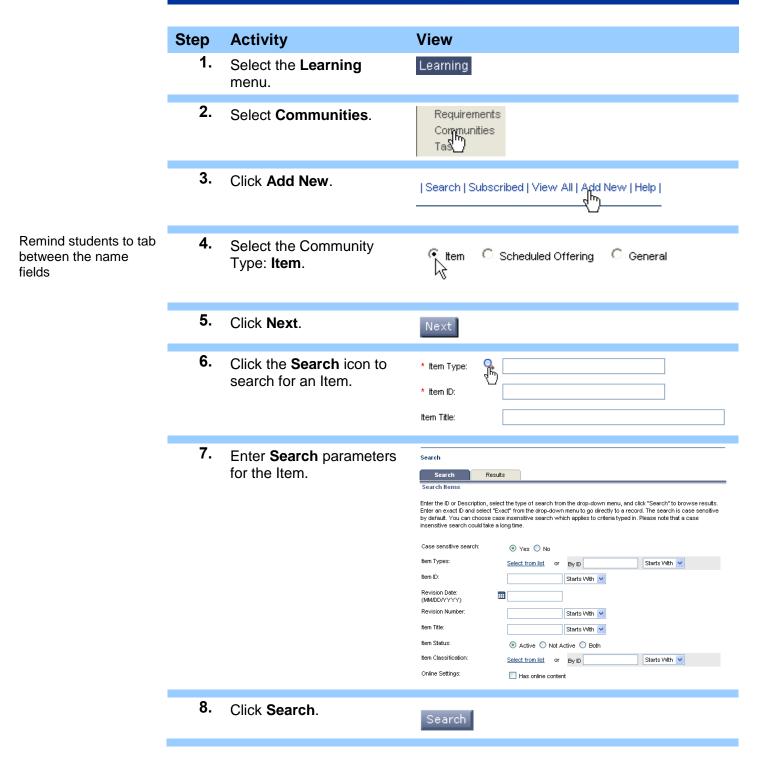
Create a General Community

| Step | Activity | View |
|------|--|---------------------|
| 8. | Enter the Domain from which the Community will be managed. Note : The default is PUBLIC . Change this unless you want any administrator to be able to make changes. | * Domain ID: PUBLIC |
| 9. | To lock the community, check the Lock Community checkbox. Note : Locking the Community prevents new additions or replies. It does not delete the Community, nor does it prevent existing posts from being read. | Lock Community |
| 10. | To subscribe to the newly created community, click the Subscribe checkbox. Note: Subscribing to a Community allows easy access when logged in as a User without having to search for it. | Subscribe |
| 11. | Click Finish. Note: Click Back if you wish to change the type of Community being created. | Finish |

Designate Moderators for a Community



Add a Community to an Existing Item



Add a Community to an Existing Item

| Step | Activity | View |
|------|--|----------------|
| 9. | Click Select on the line of the Item to which the Community is to be added. Note: The Item Type , Item ID , and Item Title fields will be automatically populated. | Title |
| 10. | To lock the community, check the Lock Community checkbox. Note : Locking the Community prevents new additions or replies. It does not delete the Community, nor does it prevent existing posts from being read. | Lock Community |
| 11. | To subscribe to the newly created community, click the Subscribe checkbox. Note : Subscribing to a Community allows easy access when logged in as a User without having to search for it. | Subscribe |
| 12. | Click Finish . Note : Click Back if you wish return to any part of the creation process. | Finish |

Note: Communities may be added to an existing Scheduled Offering. The process is essentially the same as above; substitute "**Scheduled Offering**" for "**Item**" in the instructions, and be prepared for screen that will look slightly different. It is a good idea to have the ID number of the Scheduled Offering handy before starting the process.

Glossary

Α

Accomplishment: Part of the performance module, Accomplishments are achievements that are not directly related to the User's employment or job satisfaction.

Account Code: The unique code used to track the charge-back information of a transaction.

Active: An active record is available to be updated, fully functional, and will appear on reports. To change the status of an Item or to view, edit, and report on an inactive record, the system administrator must grant the User a security privilege to do so.

Active Locale: Locale is the term used to describe a specific language with a given cultural, geographical, and political region (i.e., a local market). Think of an active locale as a specific language with related information such as numbers, date, and time currency for a specific local market.

Activity: A Learning Event associated with an initiative. Activities are automatically assigned to goals when Users align their goals with an initiative. Users can also assign their own activities to goals. When an activity is assigned to a goal, Users can request a schedule of the related learning, or add the learning event to their learning plans.

Admin User ID: A system ID that appears when AgLearn takes any automatic action, such as moving a User from the Waitlist to Enrolled status when someone withdraws from a Scheduled Offering, or when a training request is denied because the necessary approvals have not been granted before the start date of the learning event.

Adopt an Initiative: Part of the Performance module, describing the copying of an initiative to a subordinate organizational structure. See also *Align an Initiative*.

AICC: Airline Industry CBT Committee. A standard for online courseware that guarantees interchangeability and data exchange capability between online learning development packages and players.

Align an Initiative: To an initiative at the subordinate level in support of initiatives posted at a higher level. See also *Adopt an Initiative*.

Assessed Level: The mastery level earned by the selected User for the associated competency.

Assessment: The assessment/rating of a User's demonstrated Competencies, based on a previously established rating scale. Users can assess themselves or their peers through Assessment Surveys. Administrators can record assessments using the Competency Assessment Recorder. Completed Assessments are displayed in the User's Assessment History.

Assessment Date: The date on which an assessment is completed in AgLearn.

Assessment Process: The procedure by which individual User(s) are assessed on one or more competencies.

Assessment Rating: The relationship between a User's assessed mastery of a competency and the mastery rating expected of the competency.

Assessment Survey: A collection of competencies and rating criteria used to assess one or more Users.

Assignment Profile: Used to automatically assign Curricula, Catalogs, and Competency Profiles based on multiple User attributes, including (but not limited to) Domain ID, Country, Job Position, Job Location, Organization, Employment Type, or State. Users whose attributes match those of the Assignment Profile are automatically assigned the appropriate Curricula, Catalog, or Competency Profile.

Assignment Type: Categories used to help to prioritize a User's learning needs by distinguishing between need-to-have and nice-to-have Items. Typical examples of assignment types in AgLearn are Optional, Recommended, Required, and Legislatively Mandated. Default Assignment Types can be assigned at the Item level, but may be edited to suit the situation of each subsequent assignment.

Associated Costs: Any cost of conducting a segment of a Scheduled Offering that is not otherwise defined. Examples might include food, clean-up, or travel; and any cost of instructors, material, equipment, or location, in addition to those already defined in AgLearn.

Attainment Level: An informal indication of how well a User is progressing toward assigned goals. There are three qualitative statuses for the selected initiative: On Target, Behind Plan, and Ahead of Plan.

Auto Fill Registration Flag: When enabled, moves the next waitlisted User into an enrolled status when a previously enrolled User withdraws from an offering.

Automatic Processes Module (APM): Processes pre-configured to run periodically without human intervention. APMs typically perform housekeeping and notification tasks at scheduled intervals.

В

Background Jobs: Jobs (such as large-scale assignments or reports) that would be too time/processor-intensive to run during normal working hours, and are configured to run during a specific off-hours time period. The number of records defined in the selected job MUST exceed the predefined threshold (Maximum Record Count for Online Operation) set for running background jobs.

Basis Date (curriculum): The basis date defines the beginning point of a curriculum's associated time-periods. The time-periods themselves are built using either the initial assignment information, or the retraining assignment information. Once complete, the Item is not due again until the end of the next designated period. This allows assigned learning that is due once a quarter, or once a year, to be completed at any time during the quarter or year.

Blended Item: A Learning Item type with elements of both Instructor-Led and Online Learning Items.

C

Cancellation Policy: A set of rules used to calculate what the User is charged when withdrawing from a Scheduled Offering.

Cascading Initiatives: Initiatives created in a parent organizational unit that are then made effective in subordinate units. There are ways to push initiatives to subordinate organizations: Forcing requires the sub-organizations to adopt the initiative as is; Require Alignment means the sub-organizations must align one or more of their initiatives to the parent initiative; Make Available gives the sub-organizations the option to align one or more of their initiatives to the parent initiative.

Catalog: A collection of Items and Scheduled Offerings made accessible to Users via Assignment Profiles. Users can only view training that is included in catalogs made visible to them. Items and Scheduled Offerings can be part of more than one catalog.

Chargeback: A financial transaction that occurs internally, between organizations, with one being debited for costs accrued and the other being credited for the price of services delivered. The transaction is systemic only; no invoices or checks actually change hands.

Chargeback Adjustment: A wizard used to reconcile chargeback transactions after closing a Scheduled Offering, debiting the related cost centers, and crediting profit centers of the selected Scheduled Offering. Note: A Scheduled Offering cannot be closed with an open segment.

Circular supervisor relationship: A circular relationship exists when a User is designated as his own supervisor, no matter how many levels removed. AgLearn will not permit such an arrangement and will return a Validation Error to reject any change that would create such a circumstance.

Class: An entity in AgLearn that associates a group of Users with a set of Scheduled Offerings, used to help administrators keep the Users together through a series of Scheduled Offerings. Roughly analogous to school classes, such as freshman class, sophomore class, etc.

Classification: There are four Item classifications: Instructor-Led, Online, Blended, and Other (for physical goods).

Coach: A coach is a User who may view, update, or add comments to a User's Individual Development Plan (IDP), designated by the User or supervisor. The coach has no role in the approval process of the IDP.

Company: The company by whom an Instructor is employed. This is a non-referenced text entry field associated with an Instructor record.

Competency: Competencies are measurable capabilities that are required or recommended for effective performance. Assigning a competency to an Item indicates the User will be considered to have reached the indicated proficiency level upon successful completion of the Item. *See also: Competency Type*.

Competency Assessment: The assessment/rating of a User's demonstrated Competency, based on a rating scale. Users can record assessments for themselves or their peers using the Assessment Recorder, or an Assessment Survey may be used. Administrators can record assessments using the Competency Assessment Recorder. Completed Assessments are displayed in the User's Assessment History.

Competency Assessment Level: Rating given to a User that indicates his or her command of a specific competency. The rating scale is established in the Competency Assessment subsection of the Application Admin section (System Admin area).

Competency Category: A text label (e.g., Teamwork) used to group similar competencies when displayed in a view, assessment survey, or report.

Competency Profile: A grouping of competencies that can be associated with a job position or a function to help manage the skill sets required of Users with similar responsibilities. Competency Profiles can include minimum required mastery levels as aids to identifying gaps in a User's training.

Competency Type: There are four types of competencies: Skill - Physical or mental activities that support the performance of job-related activities. Knowledge - Facts and information needed to comprehend, recognize, and/or recall terms, rules, concepts, and symbols related to the performance of job-related activities. Ability - Capacity to meet physical and/or psychomotor requirements for job-related activities (usually an innate physical attribute). Attitude - Behavior required to perform job-related activities. *See also, Competency*.

Completion Status: Indicates the current status of an Item (or Scheduled Offering), relative to a User. The completion status appears with each Item in the Learning History (if complete) or the Learning Plan (if incomplete).

Contact Hours: The actual number of hours of instruction received during a Scheduled Offering. For example, an Item that begins at 8 AM and ends at 5 PM is nine hours in duration, but may only count as eight contact hours due to a one-hour lunch break. The delineation between contact hours and total hours allows accurate recording of actual training time compared to the total hours of resource usage.

Content Object: A database record indicating content that can be launched by Users, such as Web-based training, online documents, and executable files.

Content Package: A Content Package is any grouping of Content Objects, Exam Objects, and/or Objectives. Content Objects may belong to more than one Content Package.

Content Player: Any software application used by a workstation to open and/or play an online Content Object.

Copy Daily Segments: Duplicates an entire day full of segments within a Scheduled Offering, including all related data. The duplicate segments can then be edited to suit schedule needs.

Cost Center: The account code being debited in a financial transaction. If multiple cost centers are debited in a single transaction, the total percentage distribution MUST equal 100.

Cost Formula: The mathematical expression used by the AgLearn to calculate the cost of a selected event or transaction.

Cost Name: User-defined name for a cost with associated formula. The formula can be numeric, and/or another cost name with any combination of the following valid mathematical operators. Cost names are used in association with both Items and Scheduled Offerings. An example of a Cost Name: FOOD, with the Formula: Drinks+Lunch+Dinner.

CPE: Credit for Professional Education. Assigned by professional organizations as a way of tracking the volume and currency of specific, profession-related training.

Credit Hours: A method of tracking the successful completion of Items by weighting the relative value of each Item. Any number of credit hours can be associated with each Learning Item, to be awarded upon completion of the Item.

Critical Needs: Learning needs that have expired, are overdue, or will expire within the curriculum expiration notification threshold set by the system administrator.

Currency Pattern: Indicates the default format for currencies used in the selected Active Locale.

Curricula Requirement: A rule used to determine completion of a curriculum, such as "any three Items from a pool of five", or "9 credit hours from a pool of four Items".

Curriculum: A grouping of Items and/or sub-curricula that facilitates the assignment of related Items to a User. Curricula are also convenient for the assignment and tracking of mandatory retraining intervals.

Custom Report: A report created to return data on USDA-specific events not readily available in the standard reports that ship with AgLearn. Examples are Bulk Reports, and Incompletion Reports.

Custom Resource: A resource used in a Scheduled Offering that is not an instructor, material, equipment, or location.

D

Days Remaining: Number of days remaining before an Item on a User's Learning Plan will be overdue.

Decimal Pattern: Indicates the default format of integers and specified decimal places in the selected active locale.

Delivery Method: The instructional method used to deliver learning. Examples might include Instructor-Led Training, Computer-Based Training, On-the-Job Training, and Self-Study. Delivery methods should be designed with reporting and information tracking needs in mind.

Delivery Offset Days: The number of days prior to the scheduled delivery date of the selected Item.

Direct Link: A link, created by an administrator in AgLearn, that guides the recipient directly to a specific page in AgLearn. Direct Links can be inserted into either e-mails or notifications.

Document: Any media (book, videotape, procedure, manual, audiotape, regulation, etc.) for which a record has been created in AgLearn. Documents may be associated with Items, curricula, tasks, or may stand alone.

Document Type: A category used to differentiate among training documents. Examples may include Vendor Manual, Regulation, Corporate Policy, Job Aid, etc. Reporting and information tracking needs should be kept in mind when creating document types.

Domain: An administrative unit in AgLearn, derived from USDA Organization Codes. AgLearn's domain structure is roughly equivalent to USDA's hierarchy. Domains determine which administrators can create and edit the objects contained within them. See also *Domain Restrictions*.

Domain Restriction: Defines the domains in which an administrator has authority. Domain restrictions may be assigned at the entity, function, and workflow levels for any role. See *Workflow*.

Domain Type: Used to determine which types of records may be assigned to a domain. For example, if a domain includes the Organization domain type then organization records can be assigned that domain. The domain types are: Users, Items, Curricula, Competencies, Competency Profiles, Scheduled Offerings, Facilities, Locations, Equipment, Instructors, Tasks, Documents, and Organizations.

Dynamic Survey: A survey used to assess a User's assigned competencies and job positions.

Ε

E-Signature Meaning Code: Used by Administrators to provide reasons and meaning for changing data that require electronic signatures. The Meaning Code enhances compliance with FDA 21 CFR Part 11 requirements ensuring the authenticity, integrity, and confidentiality of electronic records.

Effective Date: The date when a new or revised Item will be in effect for the calculation of Item completion statuses and curriculum statuses. By default, new Items have the current date as the effective date. Be aware that accepting the current date will make any curricula containing the Item incomplete, as Users will not have had time to complete the new or revised Item.

Employee Status: Indicates the User's employment status (e.g., full-time, part time, temporary, seasonal, etc.).

Employee Type: Used to designate whether a User is a contractor, consultant, partner, etc.

Equipment: Reusable resources used in the delivery of Scheduled Offerings. Examples include overhead projectors, television monitors, and VCR players.

Equipment Status: The current status of a given piece of equipment, as defined in AgLearn, such as Operational, On Loan, Inoperative, Undergoing Maintenance, etc. Depending on the definition of an equipment status, equipment may not be available for scheduling.

Equipment Type: Categories by which different types of equipment may be grouped, such as Overhead Projector, VHS VCR, Video Monitor, etc.

Exam/Survey Object: A database record containing all details of an online examination or survey, including questions and objectives, percentage grade required for passing, electronic proctoring requirements, messages displayed to Users before and after the exam, the exam's launch method, information about usage, and other software behaviors.

External Event: A Learning Event for which there is no corresponding AgLearn Item. An example might include a college course, or a one-time seminar.

External Exam: Any exam created with a tool other than Plateau Question Editor.

External Reports: Reports generated using third party tools, then run in AgLearn.

F

Facility: A grouping of training locations. Facilities may be buildings, plants, branch locations, or any other logical way to group locations. The locations within a facility can share the facility's work week profile, holiday profile, equipment inventory (for equipment assigned to a specific facility, but not to a specific location within the facility), and material inventory.

Field Chooser: Describes the ability to add or remove columns in Search Results tables.

Force Incomplete: When checked for a curriculum, this check box requires AgLearn to calculate whether the status should be Complete or Incomplete based on the User's latest attempt at completing the Item. If the User's latest attempt is incomplete, the system will calculate the expiration and required dates based on the date/time of the last unsuccessful attempt, whether or not the initial retraining period has expired.

Free-floating competency: A competency assigned to a User independent of any competency profiles or job position.

Free-floating Item: An Item assigned to a User, independent of any curriculum.

G

Gap: The difference between a required level and the User's current level for a specific competency that is included in the User's competency profile. A negative gap indicates a learning need (e.g., the required mastery level is 4 and the User is assessed at a level of 3; the gap is -1 and a learning need exists).

Goal: A grouping of objectives in a development plan. A goal represents a high-level development milestone toward which a User may strive. Goals need not be realistically attainable (e.g., to become the perfect basketball player). A goal is supported by one or more objectives, each of which should be related to achieving the goal.

Grade: A value to indicate a User's examination score for a specific learning event. Grades may be numeric or ratings-based.

Group Instance: A collection of existing Scheduled Offerings. Group instances can be used as search criteria to help keep groups of Users together by enrolling them in the same Scheduled Offerings as a unit. For example, an Item has training sessions occurring simultaneously for the same Item. Each session has 2 Scheduled Offerings, but one session is in California and one is in New York. By adding a Group Instance for each location, Users cannot be inadvertently enrolled in one Scheduled Offering in New York, and another in California.

Grouping: A mechanism by which administrators can define how report output is displayed. For example, a User Item Completion Report may display By User, with each completed Item appearing under headings of User names; or By Item, with User names displayed under headings for each Item. Many standard reports grant the option to start each group on a new page.

Н

Holiday: Calendar dates defined in AgLearn when training should not be scheduled at a learning facility. When you schedule an offering, AgLearn will not allow you to schedule the offering at a facility on a date that has been defined as a

holiday, unless you override the default. When you schedule an offering lasting two or more days, AgLearn will skip over any holidays unless you override the default.

ı

Individual Development Plan (IDP): A collection of goals, objectives, and activities for a specific User. An IDP is a defined career and professional development plan, generally developed collaboratively between a User and his/her Supervisor. It reflects the current and future development needs for the User (employee), including both the employee's current position as well as desired future positions. It may include personal and professional goals. An approved IDP is related to the User's Learning Plan, but is broader, as it may include non-learning related activities as well.

Individual Development Plan (IDP) Template: A collection of IDP sections that may be established unique to each agency.

Initial Period: The number of days between the assignment of a learning requirement and its required completion. Each Item can have a default initial period that may be overridden on assignment.

Initiative: Allows executives and managers to define the goals for the Department or their respective agencies as a way of providing employees with guidance in the creation of Individual Development Plans.

Initiative Alignment: Describes the relationship of goals among different levels in the same agency hierarchy. For example, how the goals for APHIS-VS relate to the goals for all of APHIS.

Instructor: A human resource, defined in AgLearn, that is used to deliver learning.

Integer Pattern: Describes the default format of whole integers in an active locale.

Internationalization (I18N): The process of developing and implementing the application so it is easily adaptable to a specific local language or set of standards.

Inventory Type: All inventory tracked in AgLearn is defined as either a Material or an Item (distinct from Learning Item, as described below).

Item: Also referred to as Learning Item. An assignable unit of learning for which completion can be tracked and recorded. Items can be Web-based, Instructor-Led, blended, written materials, videos, etc.

Item Pool: A selected group of Items that make up a curriculum requirement.

Item Source: Typically identifies an Item's origin, such as developer or author, agency of ownership, etc.

Item Type: Logical groupings of learning activities useful to differentiate among potentially similar Items. Typical Item types include course, class, certification, OJT, interview, etc. Types should be defined with reporting and information tracking needs in mind, as the establishment of these categories can greatly increase the value of AgLearn's standard reports to your organization.

Iteration (online exam): An attempt by a User to complete an exam. For exams and surveys created in the Exam Definitions section, iterations can be limited to one by specifying, on the Summary tab, that the maximum number of allowable attempts for the exam is one. Instructor or administrator intervention can be made necessary before subsequent iterations by setting the Lock exam flags.

. I

Job Location: The physical location where a User works.

Job Position: A definition or title of the employment position held by a User.

L

L10N (Localization): The process of adapting the application to a particular language (within a specific geographic and political region), and desired local standards like date, time, currency, etc. AgLearn is an internationalized application, developed so that localization is relatively easy to achieve.

Label: The displayed value that describes a specific entry on the User interface of the application.

Label Links: A link adjacent to a data entry field that names the field and acts as a tool to find the relevant data. Clicking a label button opens a page through which the administrator may search for allowable values.

Launch Method: Specify the file path (location) for online content and command line parameters (as needed) that are used when a User launches the Content Object. There are five different launch methods: Content Player, Document Type, AICC, Browser, and SCORM.

Learning Event: A User's completion, or attempted completion, of a Learning Item. For example, when attendance or participation in a Learning Item is recorded, a corresponding Learning Event is added to the User's Learning History. Learning Events can be either internal (based on an AgLearn Item) or external.

Learning History: A detailed listing of a User's recorded Learning Events.

Learning Needs: Learning Items assigned to a User's Learning Plan.

Learning Plan: A list of Items a User must complete, with target completion dates for each.

Locale: The amalgamation of a specific language's unique syntax and patterns for numbers, date, and time specifications, and standards for labels as well. See also *Active Locale*.

Localization (**L10N**): The process of adapting the application to a particular language (within a specific geographic and political region), and desired local standards like date, time, currency, etc. AgLearn is an internationalized application, developed so localization is relatively easy to achieve.

Location: A specific place within a facility where a Scheduled Offering or Segment is delivered. Locations could be classrooms, simulators, or conference rooms. See also *Location Types*.

Location Type: A logical grouping of locations. Typical examples might include Classroom, In- Plant Location, Simulator, or Auditorium. Location type data is used by AgLearn to provide a list of suitable locations when creating a Scheduled Offering. By default, AgLearn displays only locations of the type(s) indicated as suitable, but the default can be overridden, if necessary.

M

Master Inventory: A list of all Items and Scheduled Offerings available in your system. Catalogs are populated from the Master Inventory.

Materials: Supplies that are used up during learning, such as pens, handouts, giveaways, etc. Commonly known as consumables.

Maximum Assessment Rating: This field contains the maximum rating to use for competency assessments.

Maximum Registration: This indicates the maximum capacity for a Scheduled Offering.

Minimum Registration: The minimum number of enrollments required for a specific Scheduled Offering to occur. This field is strictly informational and will not impact the Scheduled Offering.

Ν

Next Action Date: See *Required Date*.

Nominator: The person authorized to propose rater(s) to assess a User.

Notification Database Tag: A variable used in the notification templates and syntaxes, replaced at run time by context-based data.

Notification Syntax: The notification tag definition used to perform looping. See also *Notification Database Tag.*

Notification Template: A pre-parsed message format that includes database tags to be populated at run time within a defined context. The templates may have multiple syntaxes.

Numeric Grading: Allows the creation of multiple score ranges, associating each range with a completion status. Users are assigned a completion status corresponding with their score for the Item in question. See also, *Ratings-based Grading*.

0

Objective Grade Value: The percentage of correct answers required for a User to have mastered (or passed) an Objective.

Objectives: A statement that specifies the skills acquired by the successful completion of the learning session. Effective objectives describe what Users must accomplish, focus their attention on critical components, guide trainers in the development of instructional materials, and specify the knowledge and skills on which the Users are to be evaluated.

Offering: See Scheduled Offering.

Offset: The time between the end of one segment and the beginning of the next for the same Scheduled Offering. For example, if a one-hour lunch break is to be inserted between the morning and afternoon segments of an offering, an offset of one hour can be indicated. AgLearn will automatically calculate the appropriate start and end time, leaving the one-hour gap for lunch.

Online Instance: The launching of an online Item for the first time. If the Item is not completed in one session, subsequent sessions will not create a new instance. Once an Item is completed and entered in Learning History, a subsequent launch will create a new online instance, which may also eventually become part of Learning History upon completion.

Online Item: Any Item that is available for Users via the Internet.

Online Settings: The parameters and settings for the delivery of online content.

Organization: Any virtual entity to which a User belongs, created solely for AgLearn administrative purposes. An Organization need not have any relationship to any actual USDA entity. The Organization entity can be used to reserve Slots, make purchases, grant User permission to use Account Codes, and control User access to Catalogs.

Organizational Group: A grouping of organizations.

P

Pattern: A format that describes the manner in which dates, time, and numbers are displayed throughout the application.

Pattern Type: The categories into which Patterns are grouped. The four Pattern Types in AgLearn are Integer, Decimal, Currency, and Percentage. See also *Pattern*.

Peer: In evaluations, a User or external person other than the User being evaluated, that User's supervisor, or one of that User's subordinates.

Pending List: A virtual listing of all Users with approvals currently pending.

Percentage Pattern: Used to indicate the default format of percentages in the selected active locale. See also *Pattern*.

Performance Review: Used to appraise, measure, and report on an individual employee's performance during a specified time period, such as a calendar or fiscal year.

Performance Review Process: The definition of how and when performance reviews are created and scheduled for employees.

Performance Review Template: The definition of the format and steps involved in a performance review, and the options available to the individuals involved.

Pool of Items: A defined group of Learning Items from which a User must select in order to satisfy a requirement.

Post-work materials: Consumables that must be sent to students and/or instructors after the completion of a Scheduled Offering. Examples might include surveys, follow-up reading material, etc.

Pre-work materials: Consumables that must be sent to Users and/or instructors in advance of a Scheduled Offering. Examples might include prerequisite reading material, pre-class assessment, etc.

Prerequisites: Items that must be completed before the current Item can be attempted.

Pricing Rule: The ID, description, and discount rate (percentage) for pricing Items in the Master Inventory and catalogs.

Proctor: An instructor who has been designated as an online examination monitor. Proctors are assigned proctor codes that enable them to unlock User machines in the event of certain events or conditions, such as a failing grade on an exam.

Profit Center: Refers to the entity/account that is being credited in a commercial transaction.

Published Price: The price published for a selected Item.

Q

Question: A single page that appears in an exam or survey, giving Users an opportunity to demonstrate their ability to distinguish the correct answer from among a choice of possible answers.

R

Rater: A User, supervisor, subordinate, or peer tasked with evaluating a User in AgLearn.

Rater Approver: The person designated to approve the proposed rater(s) for a User.

Rating Criteria: Text descriptions for each rating label in a rating scale.

Rating Label: Text labels that describe the meaning of each integer value of a particular rating scale.

Rating Scale: A range of continuous integer values (1..n). Multiple rating scales can be defined, each with different values for "n". A rating scale can be associated with more than one competency.

Ratings-based Grading: Allows multiple values to be used for grading, each of which may be associated with a completion status. Completion statuses may then be assigned based on where the User's examination score falls in a range. See also, *Numeric Grading*.

Region: An entity that describes the location of assets and Users. Regions do not need to be geographically based. If a facility is assigned to a region, the locations, equipment, and materials associated with the facility are also placed in that region.

Register: To place a User's name on the planned list of participants in a specific course offering.

Registration: To place a User's name on the planned list of participants in a specific Scheduled Offering.

Registration Status: The status of a User's registration. Types include: Enrolled, Waitlist, Pending, and Cancelled.

Report: Data generated in HTM, CSV, XML, or PDF from a specific query.

Request: A notification generated by a User to inform AgLearn of the User's need or desire for specific training. A request does not place a User in active registration or on the Waitlist for any specific instance. AgLearn may automatically create Requests when an Item is canceled or when a Scheduled Offering is delivered with Users still on the Waitlist who could not be accommodated.

Required Date: The date by which all Items related to the selected curriculum MUST be completed.

Requirement: An entity that allows Users to exercise flexibility when determining which training to complete to receive credit for a curriculum, essentially creating "electives". Examples of Requirements would be "any three Items from a pool of five" or "twelve credit hours from a pool of six Items". Requirements may be combined with mandatory Items and subcurricula in the same curriculum. See also *Requirement Type*.

Requirement Type: A means of categorizing Requirements. There are three Requirement Types: Number of Hours of a Specific Credit Type, Number of Hours of a Specified Hour Type from a Pool of Items, and Number of Items from a Pool of Items. See also *Requirement*.

Requirements-based Curriculum: A curriculum for which the completion status is determined by Requirements, instead of a listing of mandatory Items. See also *Requirements*.

Resource: Assets needed to execute a Scheduled Offering, such as instructors, locations, equipment, etc.

Retraining Interval: The number of days that may pass between the time a User completes an Item in a Curriculum and when the Item must be completed again. This applies only to Items that require recurring training. If a retraining interval has been passed without completion, the Curriculum will become incomplete.

Retraining Period: Refers to the number of days between the last time a User completed an Item and when he or she must complete it again.

Review Flag: A system-generated flag automatically created when a document is revised. The flag indicates that an Item or curriculum related to the document has not been checked for any potential conflicts between the current information and information that may have been added, deleted, or changed by the revision.

Revision Date: The date of an Item's most recent revision. A new Item's Revision Date will be the date of origination.

Role: A combination of one or more workflows assigned to an administrator. See also *Workflows*.

Rule: Comprised of a Delivery Offset (Days) with a corresponding reimbursement price adjustment for the selected Item or material.

Rule-Level Retraining Period: Provides a mechanism to specify a retraining period separate from the Item retraining period. Selecting a rule-level retraining period overrides the Item level retraining periods for all Items associated with the selected requirement.

Rule Template: Provides "out-of-the-box" rule templates that may be used to quickly build curriculum requirements. The templates contain all the entities needed to create a valid requirement.

S

Schedule Block: Used to describe offerings that are not Item-based, do not appear in Catalogs, and do not have User events recorded against them. Schedule Blocks are often used to make Users and resources unavailable on the learning calendar, such as when equipment is undergoing maintenance, or a User is out of the office for an extended period of time, etc.

Scheduled Offering: An Item or learning event with a scheduled date and time.

SCORM: Sharable Content Object Reference Model (SCORM). Defines a Web-based Learning Content Aggregation Model and Run-Time Environment for learning objects. The SCORM is a collection of specifications adapted from multiple sources to provide a comprehensive suite of e-Learning capabilities that enable interoperability, accessibility, and reusability of Web-based learning content.

Search Page Selector Icon: A control that opens a search page where you can select an element from the database. The element you select will fill in the corresponding field to the right of the icon.

Security Profile: Pre-defined sets of security permissions (e.g., View, Create, Modify, etc.), called security functions, assigned to each AgLearn Administrator. Security profiles and domain privileges work together to define an administrator's permissions in the system.

Segment: Unit of division of an Item offering, based on duration, that facilitates variable resource scheduling. For example, a 40-hour course can be divided into five 8-hour segments, scheduled one segment per day for five days; divided into ten 4-hour segments, scheduled two segments per day for five days; into four 10-hour segments, scheduled one per day for four days, etc.

Sequence Number: Indicates the order in which the User is expected to complete the Items in the curriculum. Sequence Numbers do not apply to online Items.

Shopping Account ID: A unique ID created for individual Users and organizations to track their commercial transactions.

Site: A server site for the system. Sites have different URLs and allow different User populations to use the system.

SKU: Stock Keeping Unit (SKU). An inventory mapping mechanism used in catalogs.

Slot: A space reserved for a specified Organization in a Scheduled Offering. Slots are considered to be filled seats, even though the name of the User filling the seat may not yet be known.

Sorting: In a Report, allows for output to be displayed in various formats, allowing the administrator to choose which display best suits the needs of the specific report.

Subject Area: Categories for Items and competencies used to facilitate User searches for Items in the Catalog. Subject Areas group Items and Curricula with similar topics and/or interest groups.

Subject Area Pools: In rule-based curricula, provides the ability for a User to specify a select group of Items in a specific subject area that are associated with a curriculum requirement.

Subordinate: All Users who have the target User as a supervisor (either immediate or indirect– e.g., supervisor of supervisor).

Substitute: An Item that is credited as a similar Item in AgLearn. For example, if a Curriculum requires the completion of an Instructor-Led Basic Word Item, the Web-based version may be designated as a Substitute, allowing a User to pass the Web-based version and receive credit for the Instructor-Led Item.

Succession Planning: Used by supervisors to evaluate an employee's competencies against the competencies of a job position's incumbent, and to assign Items to help the employee achieve mastery of the competencies. It can also be used to evaluate a group of employees to determine which employee is most qualified to replace an incumbent.

Supervisor: A User designated to oversee another User's learning. A supervisor has the ability to log in to AgLearn Learning on behalf of their subordinates, view subordinates' learning information, and assign learning to them. If granted permission by the system administrator, supervisors can also record learning events for their subordinates.

System Reports: Standard reports that come with AgLearn.

Т

Target: Indicates whether the student or instructor should receive the material.

Task: A task is a discrete unit of work with a definite beginning and end, which can be performed in a relatively short period of time, and which results in a finished product, a completed service, or a change in the work environment.

Total Hours: The number of hours of training contained in a Scheduled Offering, including non-instructional time. For example, an Item that meets from 8am to 5pm may have eight hours spent in training (contact hours), but nine total hours, indicating the number of hours the resources are in use; the extra hour takes into account the lunch hour.

Training Administrator: The User who creates assessment surveys and initiates the assessment processes.

U

User: Any person for whom a record has been created in the Users section of the User Management area, including employees, contractors, and others for whom you wish to keep learning records and to register for courses.

User Hours: The length of a Scheduled Offering (the sum of the segment durations).

V

V-Calendar: A file that can be sent as an e-mail attachment to automatically enter appointment information on the recipient's calendar. The recipient must use a VCalendar-compliant calendar program such as Microsoft Outlook, Netscape Calendar, or others.

vCalendar: The vCalendar specification defines a format for exchanging scheduling information in AgLearn. The vCalendar holds information about events that are normally used by group schedulers.

VLS: A file that can be sent to a person as an e-mail attachment that can automatically enter appointment information on the recipient's calendar. The recipient must use a VCalendar-compliant calendar program such as Microsoft Outlook, Netscape Calendar, or others.

W

Waitlist: A list of Users trying to register for a Scheduled Offering that has already reached a maximum capacity.

Work weeks: The days of the week during which training may be scheduled at a facility.

Workflow: A combination of a function applied to an entity. An example of a workflow is "View Users" (i.e., the function "VIEW" and the entity "USERS". A domain restriction is applied to each workflow to restrict access to certain data). See *Domain Restriction*.